TLAXCALA
UNA NUEVA HISTORIA
2021 - 2027

SECTURE
SECRETARÍA DE TURISMO
DE TLAXCALA

Sustainable Tourism Observatory
OF THE STATE OF TLAXCALA

ANNUAL PROGRESS REPORT 2024
JANUARY, 2025

La Malinche National Park

https://observatorioturisticodetlaxcala.com.mx/

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ACRONYMS

SECTURE	Secretariat of Tourism of the State of Tlaxcala
SMA	Secretariat of the Environment of the State of Tlaxcala
STyC	Secretariat of Labor and Competitiveness of the State of Tlaxcala
INAH	National Institute of Anthropology and History
INEGI	National Institute of Statistics and Geography
PROFEPA	Federal Attorney General's Office for Environmental Protection
PSTs	Tourism service providers
UATx	Autonomous University of Tlaxcala
COLTLAX	The “College of Tlaxcala” COLTLAX
NORCECA	North, Central America and Caribbean Volleyball Confederation.

BACKGROUND

The Tlaxcala Sustainable Tourism Observatory is a strategic tool that strengthens the tourism development policy promoted by the State Government, in coordination with the private sector and various economic agents. Its fundamental purpose is to consolidate tourism as an effective engine of economic growth and as an active promoter of greater opportunities and benefits for the population of Tlaxcala.

The Executive Committee of the Tourism Observatory is made up of high-level representatives from the public, private, and academic sectors, reaffirming the institutional commitment to sustainable tourism in the state.

In its second year of operation, the indicators monitored have proven to be relevant, pertinent, and adequate for tracking the main economic and social challenges that affect the performance of Tlaxcala's tourist destinations.

The results obtained have made it possible to identify areas of opportunity in terms of sustainability, particularly with regard to the need to measure the carbon footprint generated by the main tourist events in the state, as well as the percentage of energy from fossil fuels used in tourist establishments.

With the support of the members of the Observatory's Executive Committee, specific actions have been defined to gather the missing information and establish monitoring mechanisms that will provide accurate and reliable data.

The state of Tlaxcala ranks 31st in terms of land area, with 3,996.6 km2 representing 0.2% of the total national surface area. The most important towns in the state are: Tlaxcala de Xicohténcatl, Ciudad de San Pablo del Monte, Huamantla, Ciudad de Apizaco, Santa Ana Chiautempan, Zacatelco, and Heroica Ciudad de Calpulalpan.

According to the 2020 Population and Housing Census conducted by the National Institute of Statistics and Geography, the state's population is 1,342,977. The most populous municipality is Tlaxcala with 99,896 inhabitants, and the least populous is Atlangatepec with 550 inhabitants. The population density is 336.0 inhabitants per km^2.

Tlaxcala has municipalities with a strong tourist vocation, which are: Apizaco, Calpulalpan, Huamantla, Ixtenco, Nanacamilpa, Nativitas, Santa Cruz Tlaxcala Tetlatlahuca, Tlaxcala, Tlaxco, and Yauhquemehcan.

Offering as a destination:

- 5 Archaeological Sites
- 3 Magical Towns
- 20 Haciendas
- 100 Colonial Temples
- 10 Railway Stations
- 1 Zoo
- 13 Museums
- 5 Declared Monumental Areas
- 2 UNESCO World Heritage Sites
- 3 Forested areas, located in the north, west, center-west, and La Malinche (Matlalcuéyatl)
- 2 national parks: Xicoténcatl and La Montaña Malinche or Matlalcuéyatl.
- 24 Areas voluntarily designated for conservation.
- 3 Reserves and one ecological conservation area, as protected natural areas under state jurisdiction.
- 30 Handcrafted techniques

Information is monitored in five tourist centers in order to obtain the data necessary for calculating the indicators.

- Apizaco
- Huamantla
- Tlaxcala
- Tlaxcala Circuit (includes information from the municipalities of Nativitas, Tetlatlahuca, Santa Cruz Tlaxcala, Yauhquemehcan, and Tlaxco)
- Aggregates (includes information from the municipalities of Calpulalpan, Nanacamilpa, and Ixtenco).

At the end of 2024, we received a total of 375,000 tourists, of which 350,000 were domestic and 25,000 were international, an increase of 5.63% over the same period in 2023.

As a result of coordinated efforts between our state agencies responsible for tourism, culture, and sports, we increased the average length of stay by 3.38% compared to 2023, with a total of 1.53 nights on average per tourist who visited us in 2024.

The average hotel occupancy rate in 2024 was 33.48%.

We welcomed more than 2.67 million visitors to the main museums, theme parks, and archaeological sites, in addition to those attending the various tourist, cultural, and sporting events held throughout the state, such as the NORCECA Tlaxcala 2024 Pre-Olympic Volleyball Tournament, the Archery World Cup Final, the Firefly Season, as well as fairs and festivals.

Thanks to these results, the economic impact generated by tourism has increased considerably during 2024, reaching more than 738 million pesos ($36.49 million), an increase of 11.40% over 2023.

During 2024, the employed population in the state of Tlaxcala reached an average of 628,134 people. Within this total, the tourism sector registered 38,420 employed people, of whom 22,269 were women. This figure represents 3.55% of the state's employed population and 57.95% of tourism employment.

Compared to 2023, employment in Tlaxcala grew by 3.31%, while in the tourism sector the increase was 1.37%, reflecting a positive trend in the creation of job opportunities.

EXECUTIVE SUMMARY

Based on the analysis of the observatories that form part of the Sustainable Tourism Observatory Network (INSTO) of the World Tourism Organization (United Nations Tourism), this document will present the results of the 11 topics requested by the Network:

1. TOURISM SEASONALITY

- Arrival of tourists per month and by market of origin.
- Arrival of tourists per month and by destination.
- Arrival of tourists per month to main tourist attractions.
- Hotel occupancy.

2. EMPLOYMENT

- Employment generated in the tourism sector.
- Women employed in the tourism sector.
- Employment growth in the tourism sector compared to total employment growth in the destination.

3. DESTINATION ECONOMIC BENEFITS

- Tourism GDP of the destination.
- GDP generated by related activities.
- Economic spill generated by visitors to the destination.
- Private investment in the tourist destination.
- Revenue from lodging tax.

4. ENERGY MANAGEMENT

- Percentage of energy consumption from renewable sources in tourist establishments.
- Hotels that generate their energy (or part of it) from clean sources.
- Tourist establishments that implement measures to save electricity.

5. WATER MANAGEMENT

- Number of tourist establishments that implement best practices to save water.
- Number of hotels that implement water saving policies.

6. WASTE WATER (SEWAGE) MANAGEMENT

- Number of hotels that have wastewater treatment and recycling.
- Number of hotels that have wastewater treatment or are connected to water treatment systems.
- Percentage of residual water that is given treatment.

7. SOLID WASTE MANAGEMENT

- Volume of solid waste generation in tourist establishments.
- Number of hotels that carry out separation and recycling practices.
- Number of restaurants that carry out separation and recycling practices.
- Percentage of recycled garbage in relation to the total garbage generated.
- Hotels and restaurants that have eliminated the use of single-use plastics or have established policies to reduce it.

8. CLIMATE ACTION

- Carbon footprint generated by the main tourist events in the destination.
- Percentage of energy from polluting fuels (fossil) in tourist establishments.
- Percentage of non-polluting public transport (electric transport) in the destination.
- Air quality in tourist destinations in the state.
- Number of tourist establishments that have sustainable certifications or labels.
- Number of tourist establishments located in vulnerable areas.

9. ACCESSIBILITY

- Tourist establishments that have access facilities for people with different capacities.
- Tourist attractions that have easy access and use of facilities for people with disabilities.
- Number of tour operators that offer adapted tours for people with different physical abilities.
- Hotels and restaurants that have rooms and/or bathrooms for people in wheelchairs.

10. LOCAL SATISFACTION

- Degree of satisfaction of the local community with the arrival of tourists.

11. GOVERNANCE

- Number of participants from the private and academic sectors in the tourism observatory.
- Participation of the private and academic sector in the working groups of the tourist observatory.
- Percentage of hotels that provide information to the tourist observatory.
- Satisfaction of tourism agents with the state's tourism policy.
- Percentage of citizen proposals on tourism attended.

STRATEGIES TO IMPROVE INDICATOR MEASUREMENT

Priority Actions

- Design measurement methodologies to quantify the carbon footprint of major tourism events.
- Collect energy information from tourism establishments to identify their degree of dependence on fossil fuels and promote sustainable alternatives.
- Inter-institutional collaboration with organizations specializing in the environment and energy, which provide technical knowledge and tools for data collection and analysis.
- Training and awareness-raising for tourism service providers, aimed at promoting responsible practices and the use of clean energy.

Outlook

The incorporation of these indicators will strengthen the Observatory's capacity to comprehensively assess the impact of tourism in Tlaxcala, ensuring that public policies and actions in the sector are geared towards a sustainable development model. This reaffirms the institutional commitment to move towards a form of tourism that combines economic growth with environmental and social responsibility.

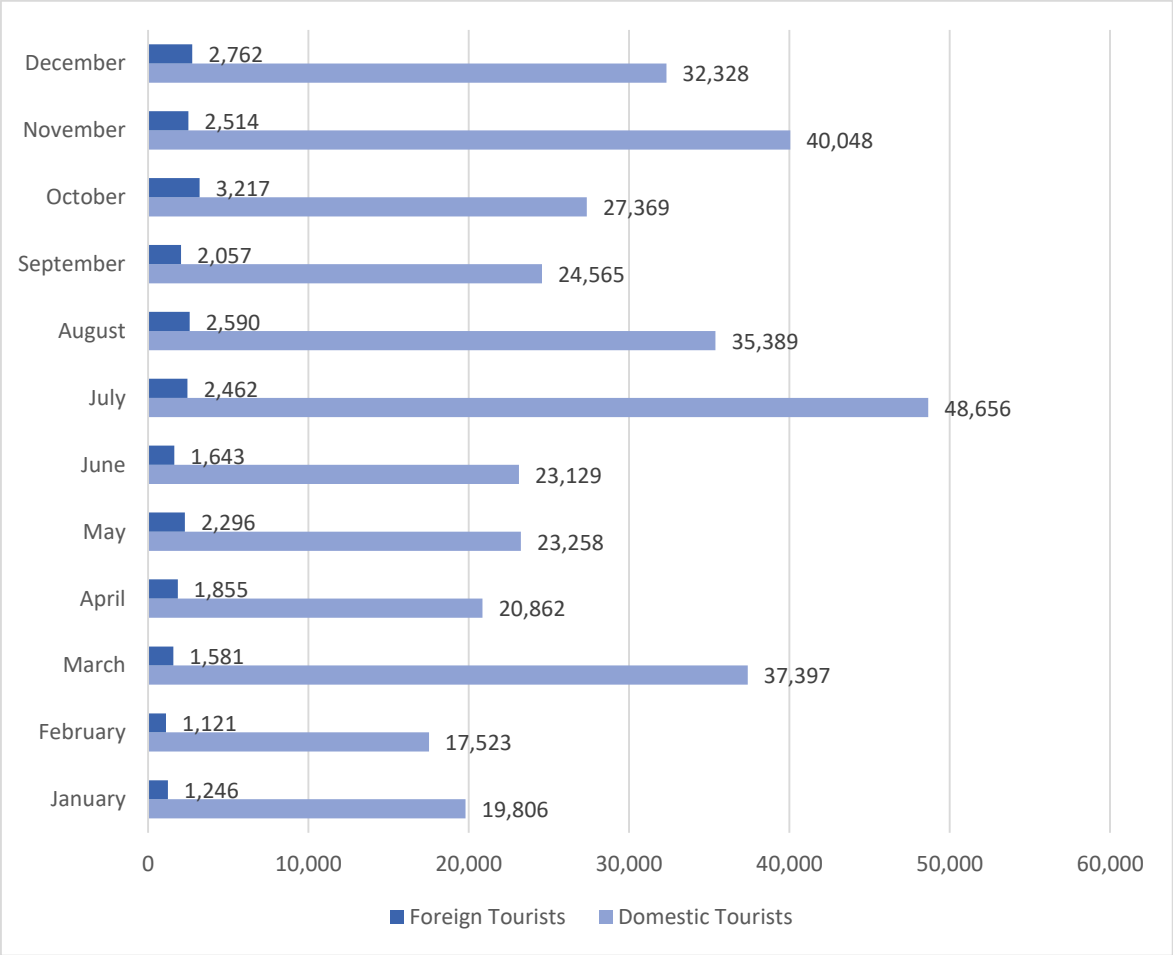
RESULTS OF THE TLAXCALA TOURISM INDICATORS SYSTEM

1. TOURISM SEASONALITY

1.1 TOURIST ARRIVALS BY MARKET
JANUARY TO DECEMBER YEAR 2024

Objective: To measure tourist arrivals to the State of Tlaxcala by national and international market and to identify the seasonality of each market.

Description: Shows the number of arrivals per month registered in lodging establishments, disaggregated by national and international market.



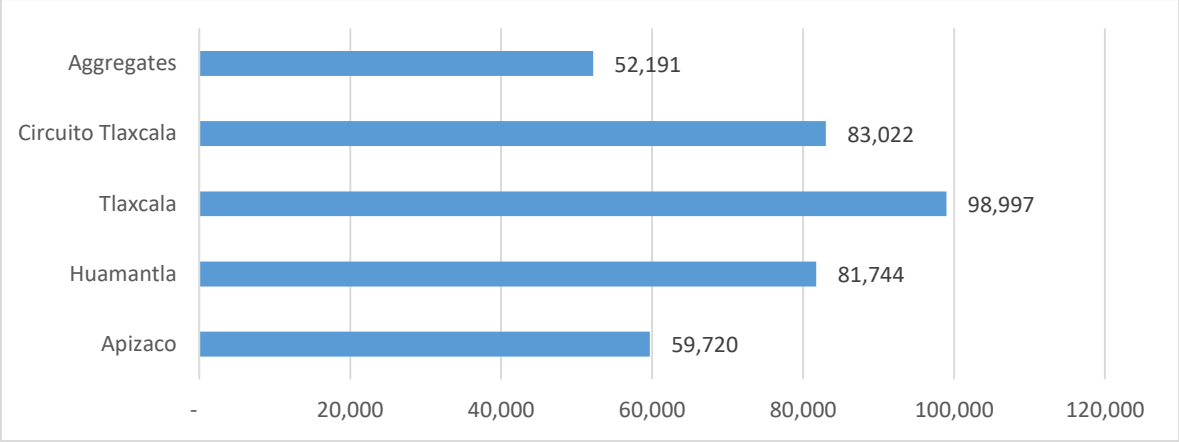
Domestic tourists	Foreign tourists	Total
350,330	25,344	375,674
93.25%	6.75%	100%

Source: DataTur Hotel Monitoring Program and Tourism Operation Directorate of SECTURE Tlaxcala.

1.2 TOURIST ARRIVALS BY DESTINATION JANUARY TO DECEMBER YEAR 2024

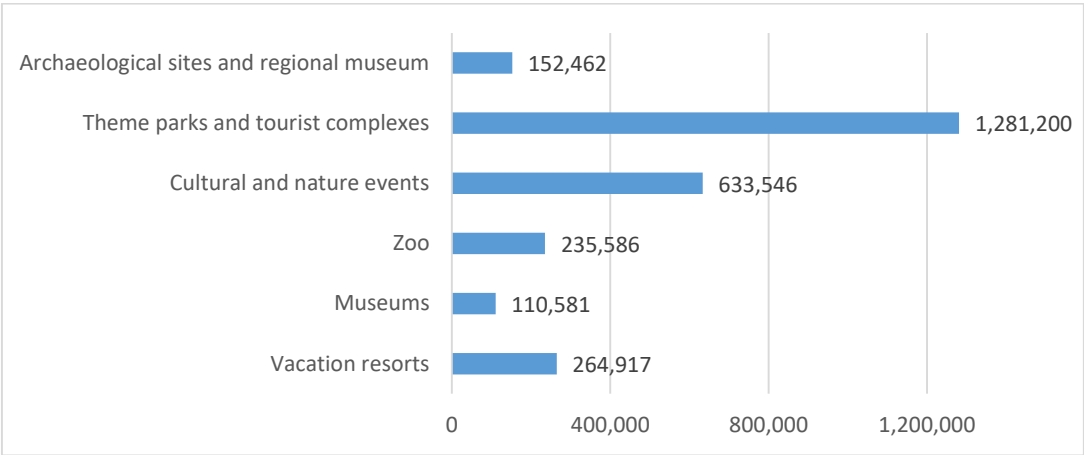
Objective: To identify the seasonality of tourist arrivals to destinations in the State of Tlaxcala.

Description: Shows the monthly number of tourist arrivals in the monthly period to each destination in lodging establishments, disaggregated by national and international market.



Source: DataTur Hotel Monitoring Program and Tourism Operation Directorate of SECTURE Tlaxcala.

1.3 ARRIVAL OF TOURISTS PER MONTH TO MAIN TOURIST ATTRACTIONS. JANUARY TO DECEMBER YEAR 2024



TOTAL
2,678,292

Source: Tourism Operation Directorate of SECTURE Tlaxcala.

1.4 HOTEL OCCUPANCY
JANUARY TO DECEMBER YEAR 2024

Objective: To measure the percentage of hotel rooms occupied by tourists at destinations in the state of Tlaxcala.

Description: Percentage of hotel rooms of tourist category occupied with respect to the total number of rooms available in a given period.

Domestic tourists
29.72%

Foreign tourists
3.76%

TOTAL
33.48

Source: DataTur Hotel Monitoring Program and Tourism Operation Directorate of SECTURE Tlaxcala.

2. EMPLOYMENT

2.1 EMPLOYMENT GENERATED IN THE TOURISM SECTOR[1] YEAR 2024

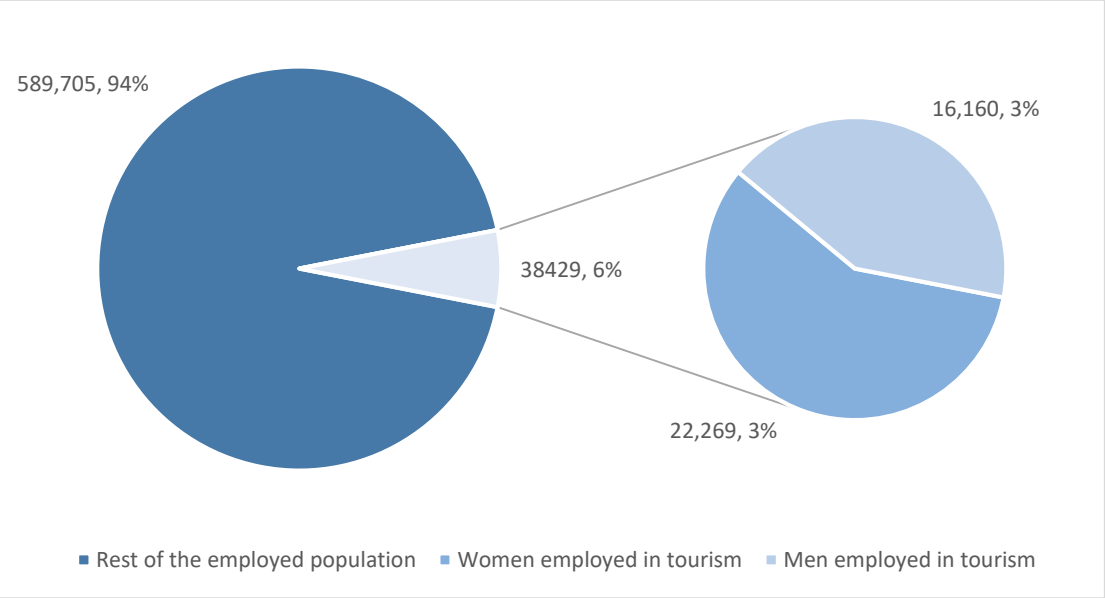
Objective: To identify the proportion of jobs in the state that are generated by tourism activity.

Description: Shows the percentage of jobs in tourism-related activities with respect to the total number of jobs in the state of Tlaxcala.

Quarterly periodicity.

38,429 THOUSAND JOBS

REPRESENTS 6.12 % OF THE TOTAL EMPLOYED POPULATION IN THE STATE.



Source: National Institute of Statistics and Geography (INEGI). National Occupation and Employment Survey
[1]Results of the 1st Quarter 2025

2.2 WOMEN EMPLOYED IN THE TOURISM SECTOR[1]

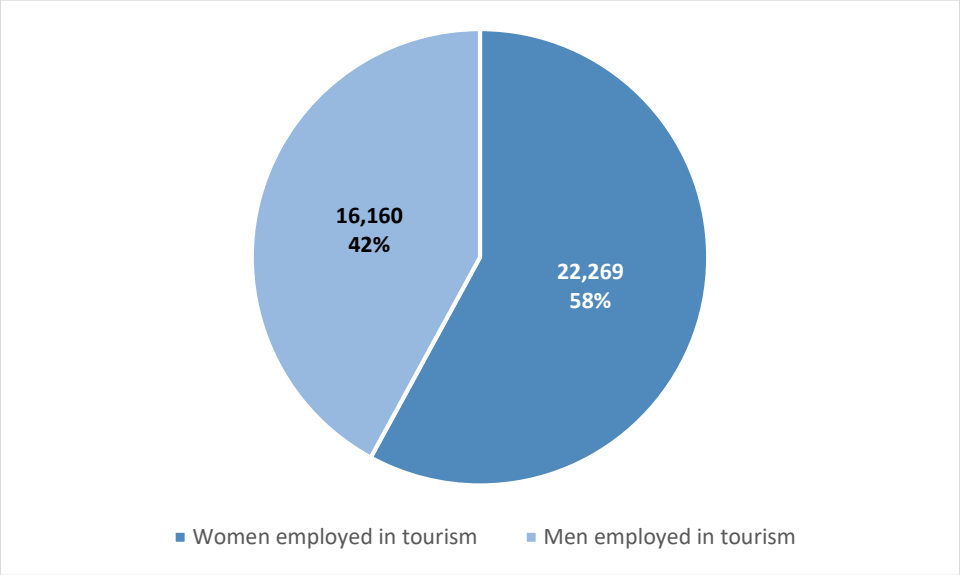
Objective: To identify the proportion of women in the number of jobs generated by the tourism sector.

Description: Shows the percentage of women with respect to the total number of people employed in tourism-related activities in the state of Tlaxcala.

Quarterly periodicity.

22,269 thousand employed women

Represents 57.95 % of the population employed in the tourism sector in the State.



Source: National Institute of Statistics and Geography (INEGI). National Occupation and Employment Survey
[1]Results of the 1st Quarter 2024

2.3 TOURISM EMPLOYMENT GROWTH COMPARED TO TOTAL EMPLOYMENT GROWTH IN THE STATE

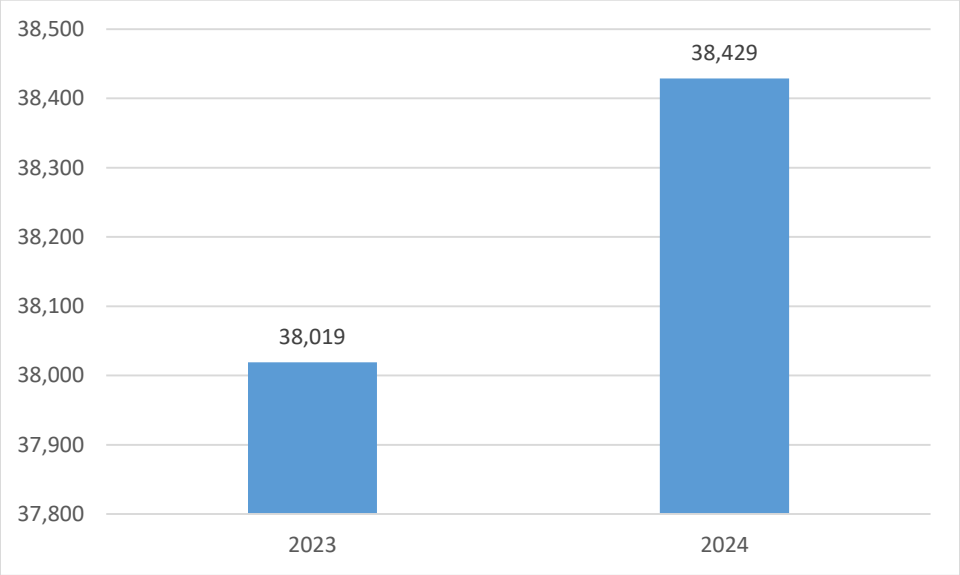
Objective: Compare the evolution of tourism employment with total employment in the state.

Description: Shows the difference in the annual growth of tourism employment and the annual growth of total employment in the State of Tlaxcala.

Quarterly periodicity.

1.08% increase

According to the tourism employment generated during the same period of 2024



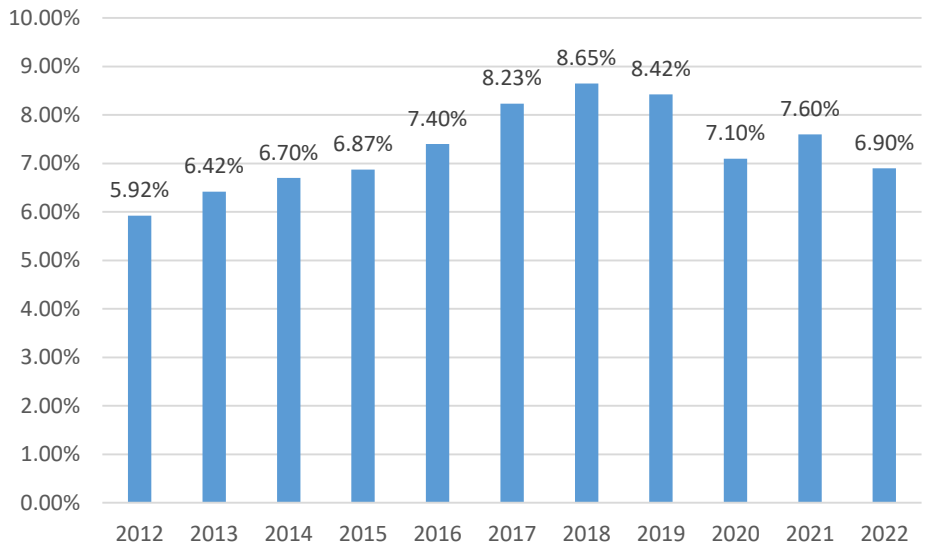
Source: National Institute of Statistics and Geography (INEGI). National Occupation and Employment Survey
[1]Results of the 1st Quarter 2025

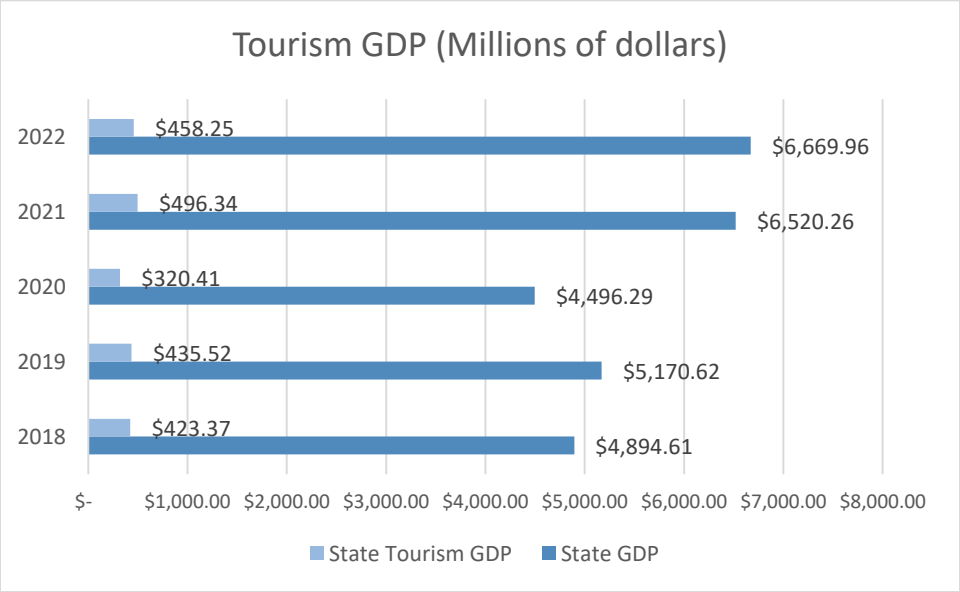
3. DESTINATION ECONOMIC BENEFITS

3.1 TOURISM GDP SHARE OF TOTAL STATE GDP

Objective: Understanding the contribution of tourism to the state's economy.

Description: Shows the percentage of tourism's contribution to the economy of the state of Tlaxcala.



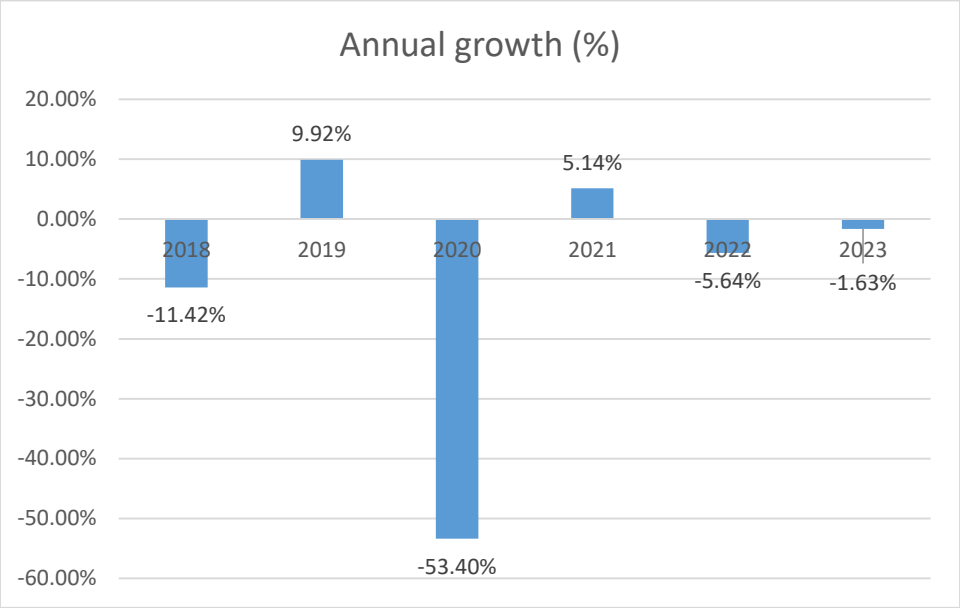


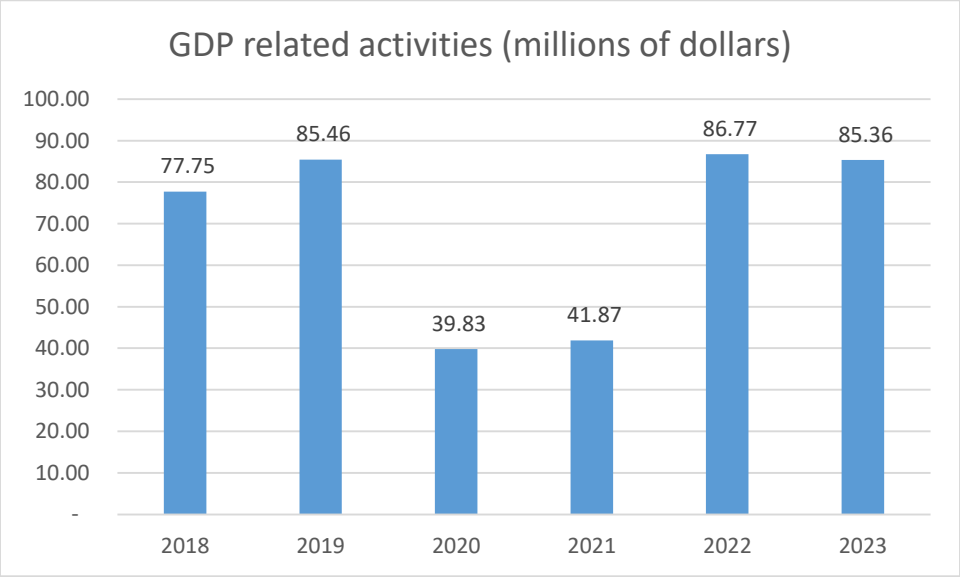
Source: Prepared by the Directorate of Tourism Operations.

3.2 GDP GENERATED BY TOURISM-RELATED ACTIVITIES

Objective: Understanding GDP growth from tourism-related activities in the state.

Description: Shows the percentage change in gross domestic product for certain tourism-related activities in the state of Tlaxcala. It will mainly be used to observe the contribution of tourism for periods when the state tourism GDP indicator is not available.





Source: Prepared by the Directorate of Tourism Operations.

3.3 ECONOMIC REVENUE GENERATED BY TOURISTS JANUARY TO DECEMBER YEAR 2024

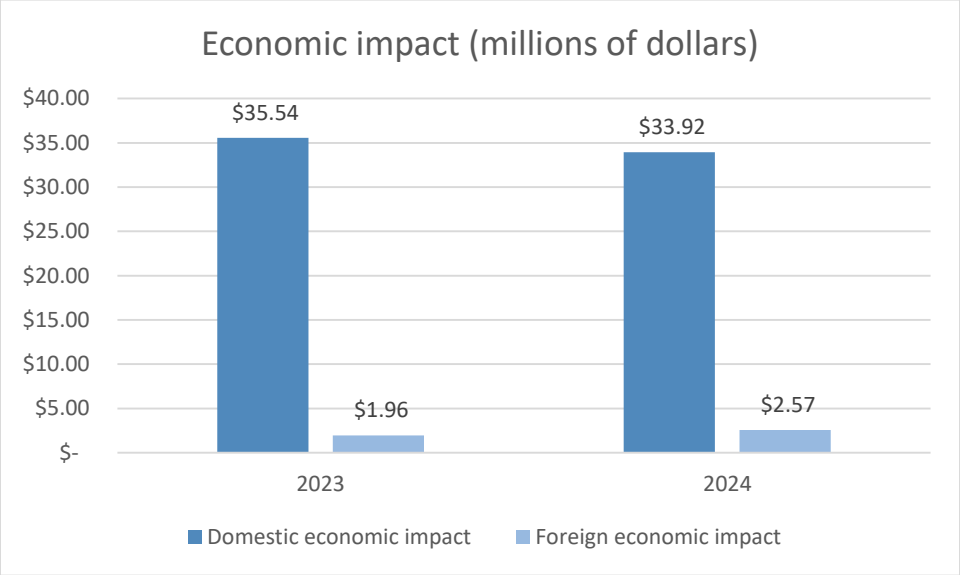
Objective: To quantify the volume of economic spillover generated by tourist spending at destinations in the State of Tlaxcala.

Description: Shows the amount of money in Mexican pesos that tourists are estimated to have spent during their stay in the State of Tlaxcala.

686.64 million pesos
(33.9 millions USD))
Domestic tourists

52.06 million pesos
(2.6 millions USD)
Foreign tourists

738.7 million pesos
(36.5 millions USD)
TOTAL



Mexican pesos per average dollar:
- 2023 = 17.68
- 2024 = 20.24

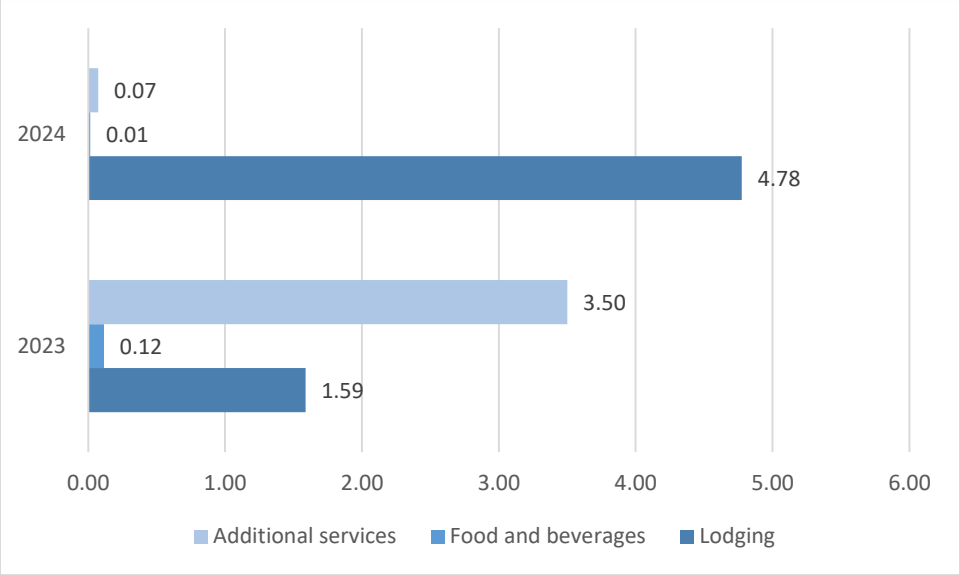
Source: Prepared by the Directorate of Tourism Operations.

3.4 PRIVATE TOURISM INVESTMENT IN THE STATE OF TLAXCALA

Objective: Monitor the evolution of private investment in the tourism sector.

Description: Shows the percentage change in the volume of private investment in a given period compared to the same period in the previous year.

Figures in millions of dollars



Mexican pesos per average dollar:

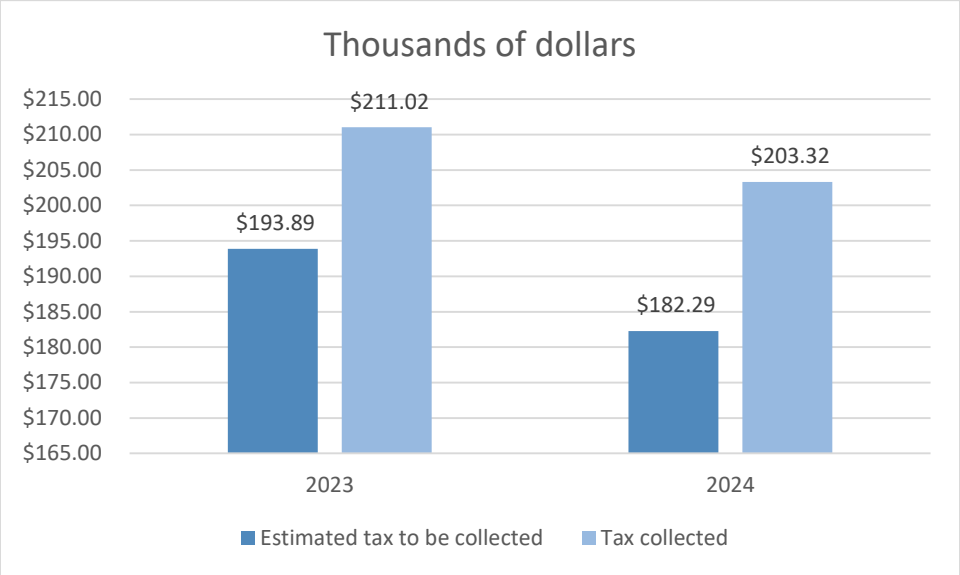
- 2023 = 17.68
- 2024 = 20.24

Source: Prepared by the Directorate of Tourism Operations.

3.5 AMOUNT COLLECTED FROM LODGING TAX

Objective: Observe the evolution of the amount collected from the lodging tax.

Description: Shows the percentage change in the amount collected from lodging tax in a given period compared to the same period in the previous year.



Mexican pesos per average dollar:

- 2023 = 17.68
- 2024 = 20.24

Source: Prepared by the Directorate of Tourism Operations.

4. ENERGY MANAGEMENT

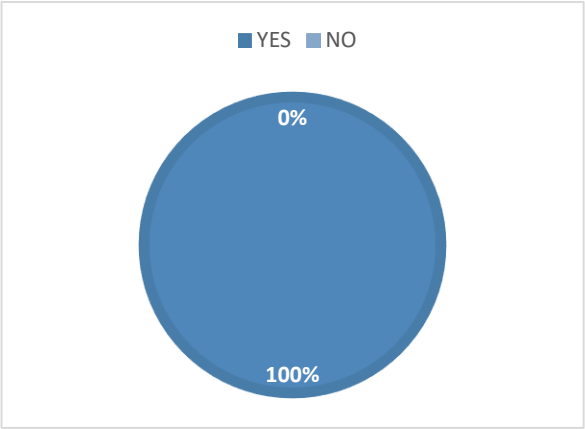
4.1 HOTELS AND RESTAURANTS THAT HAVE ADOPTED MEASURES TO SAVE ELECTRICITY

Objective: To know the progress in the number of establishments that are taking measures to care for and save electricity, for better energy management and to reduce carbon dioxide emissions.

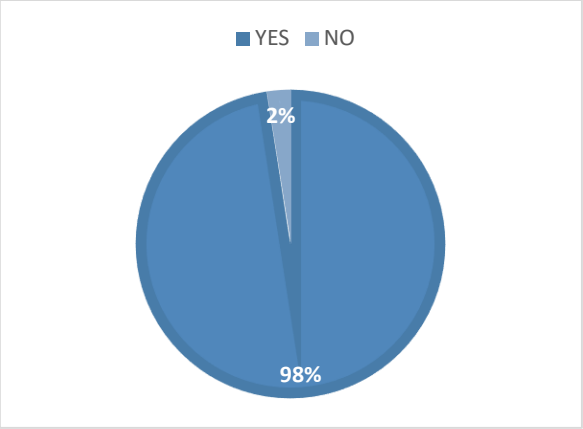
Description: Percentage of establishments that have implemented measures to care for and save the energy they consume.
Sample size: 220 hotels and 410 restaurants

Quarterly periodicity

Hotels that save electricity



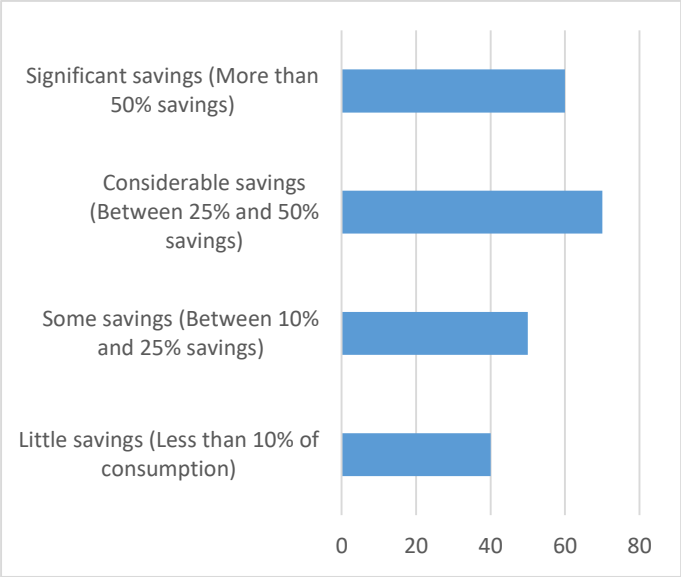
Restaurants that save electricity



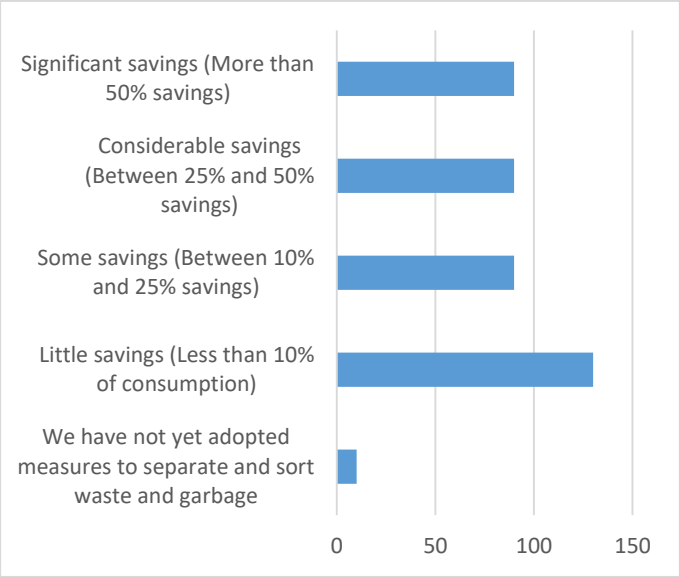
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

4.1.1 Estimated percentage of electricity savings and conservation in establishments attributable to the measures adopted.

Hotels that save electricity



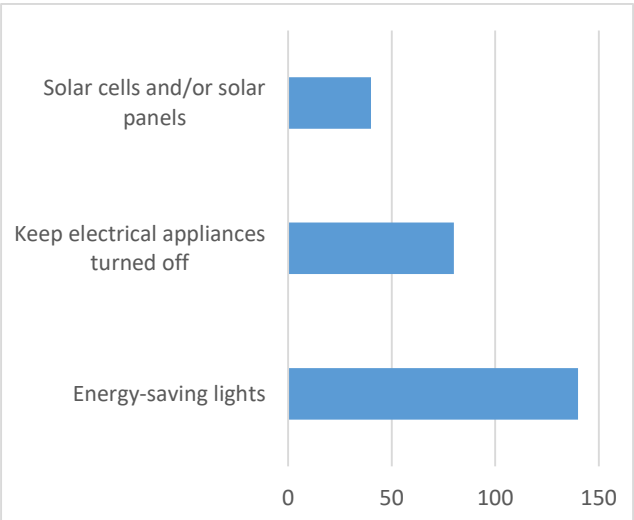
Restaurants that save electricity



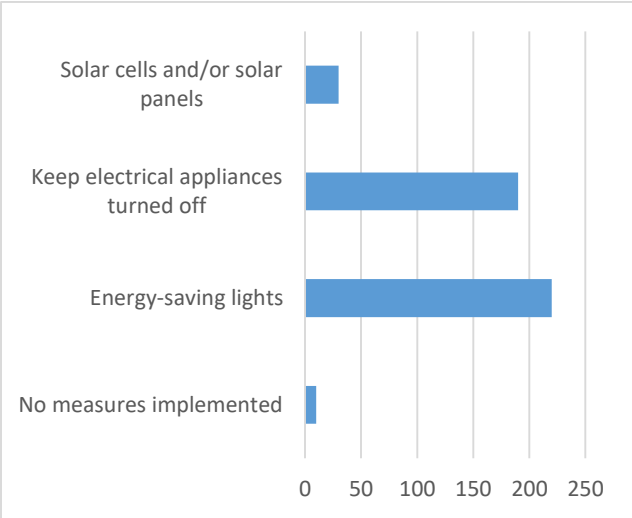
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

4.1.2 Strategic actions implemented for the conservation and efficient use of electrical energy.

Hotels that save electricity



Restaurants that save electricity



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

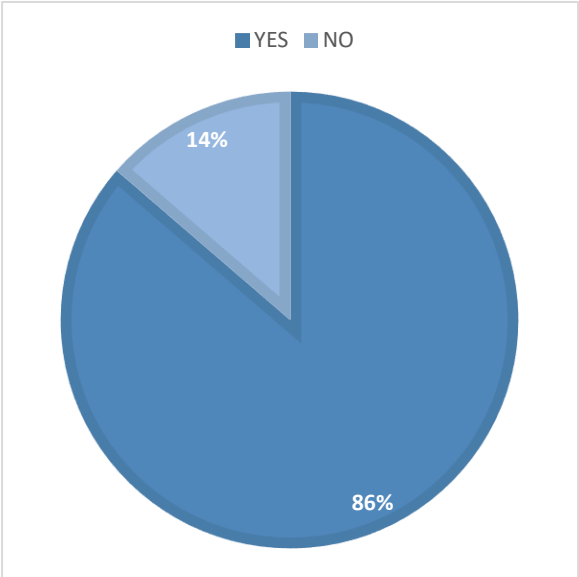
4.2 HOTELS AND RESTAURANTS THAT GENERATE RENEWABLE ENERGY

Objective: To determine the progress in the number of establishments that generate part or all of their electricity demand through clean energy sources, avoiding the emission of CO2 from fossil fuels.

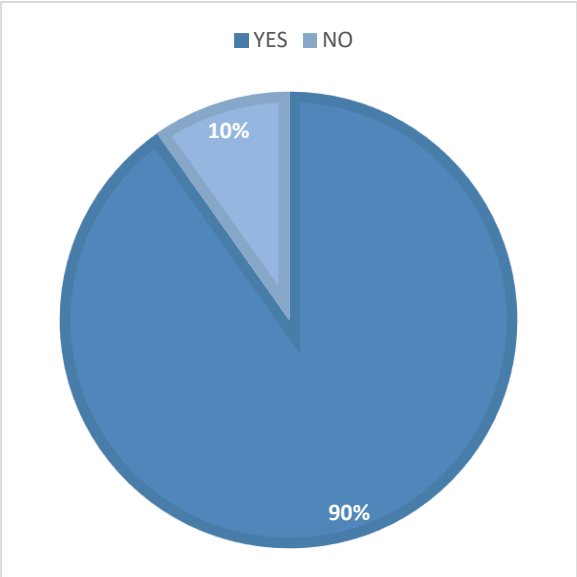
Description: Percentage of facilities that generate electricity from clean sources (solar cells, wind generators).

Quarterly periodicity

Hotels that generate renewable energy



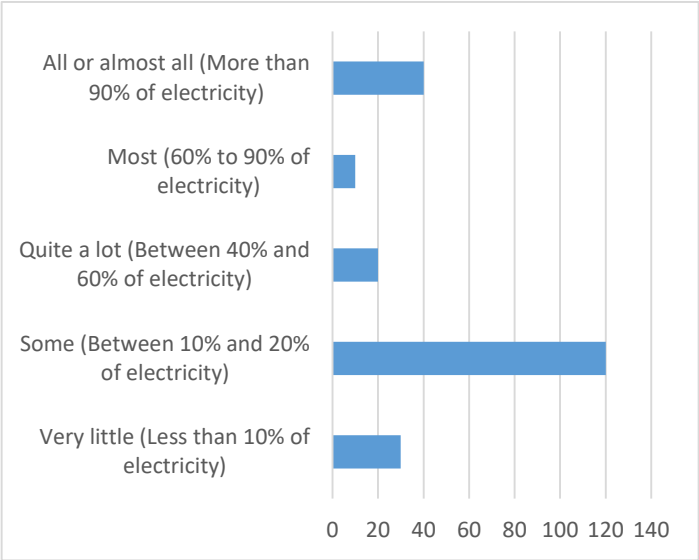
Restaurants that generate renewable energy



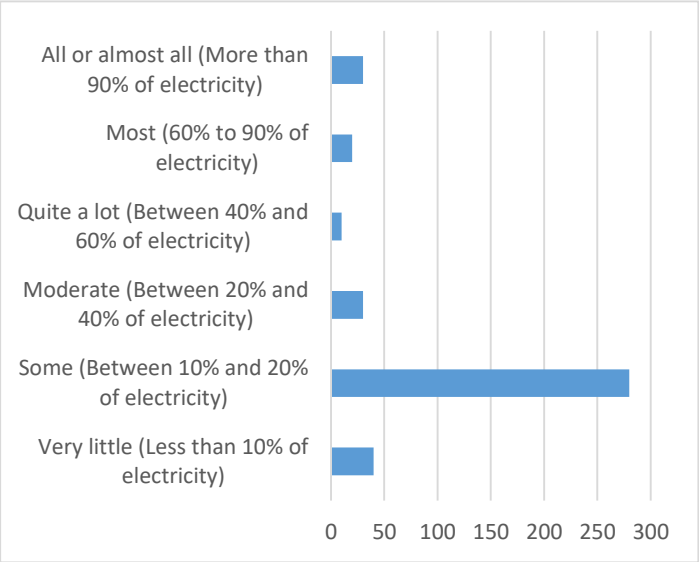
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

4.2.1 Amount of electrical energy used in establishments that comes from renewable or clean sources

Hotels that generate renewable energy



Restaurants that generate renewable energy



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

5. WATER MANAGEMENT

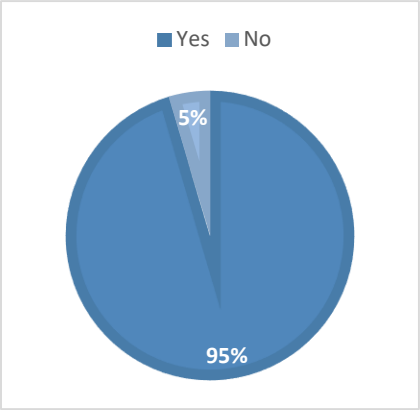
5.1 HOTELS AND RESTAURANTS THAT HAVE ADOPTED MEASURES TO SAVE WATER

Objective: To determine the progress in the number of establishments that are taking measures to save water, which is a vital resource for the sustainability of the tourist destination.

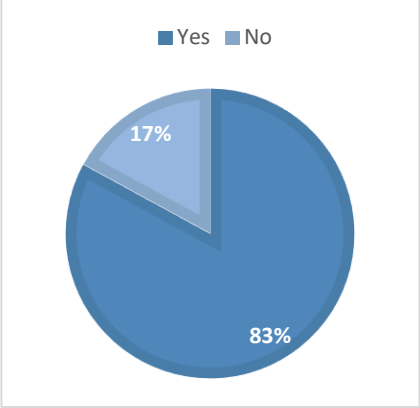
Description: Percentage of establishments that have implemented measures to care for and save the water they consume.
Sample size: 220 hotels and 410 restaurants

Quarterly periodicity.

Water-saving hotels



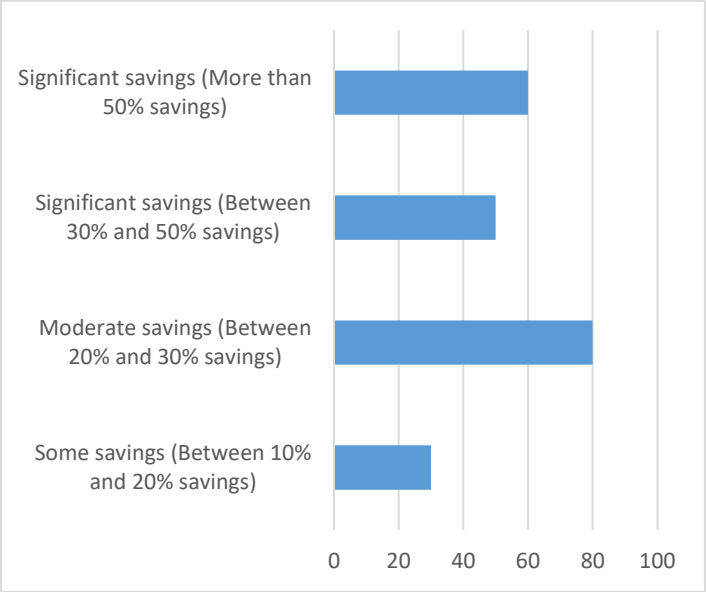
Water-saving restaurants



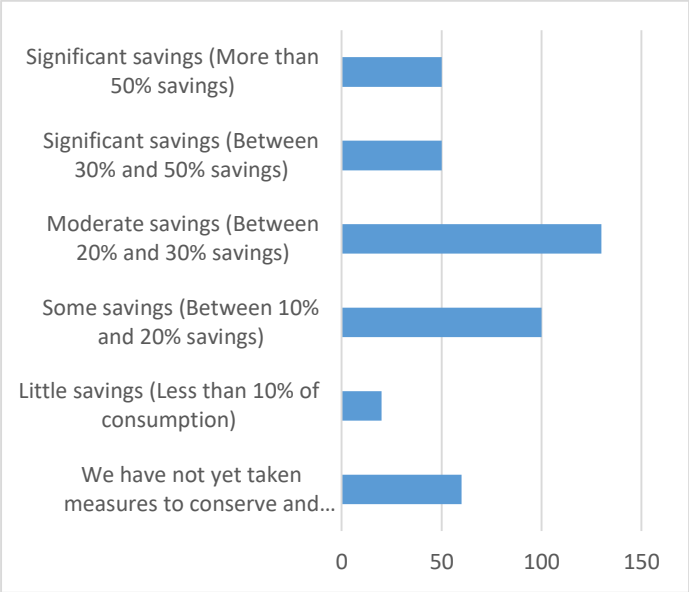
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

5.1.1 Percentage of water saved and conserved in establishments thanks to the measures adopted.

Water-saving hotels



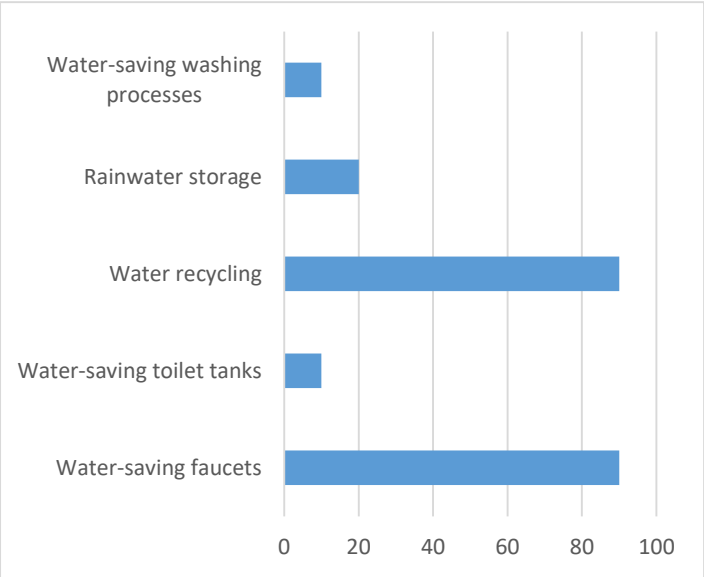
Water-saving restaurants



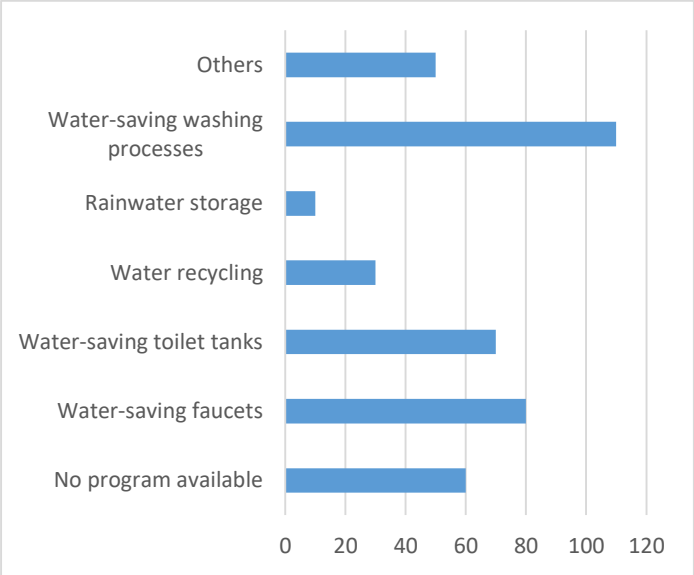
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

5.1.2 Practices implemented in establishments to ensure responsible water care and use

Water-saving hotels



Water-saving restaurants



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

6. WASTEWATER (SEWAGE) MANAGEMENT

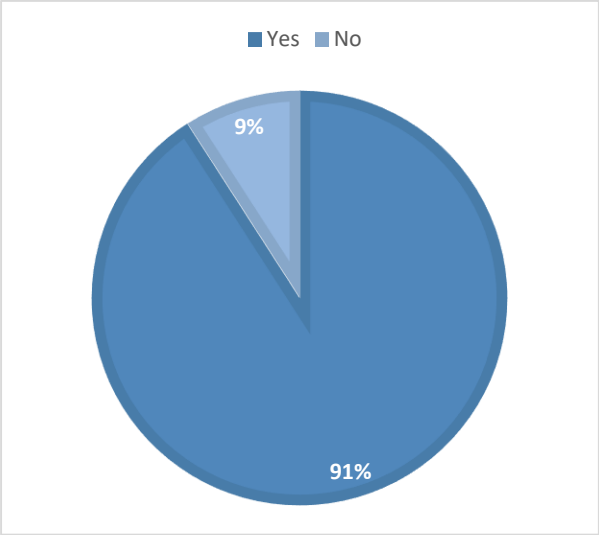
6.1 HOTELS AND RESTAURANTS THAT HAVE ADOPTED MEASURES FOR WATER TREATMENT

Objective: To determine the progress in the number of establishments that are taking measures to treat wastewater in order to prevent contamination of the destination's water resources.

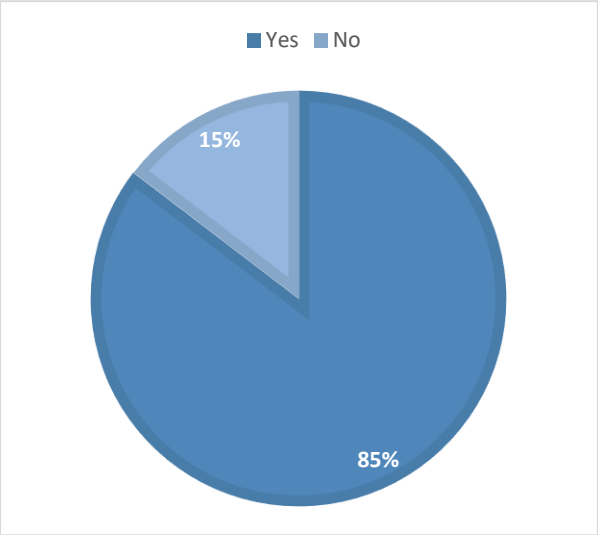
Description: Percentage of establishments that have implemented measures to treat the wastewater they generate.
Sample size: 220 hotels and 410 restaurants

Quarterly periodicity.

Water treatment measures adopted in hotels



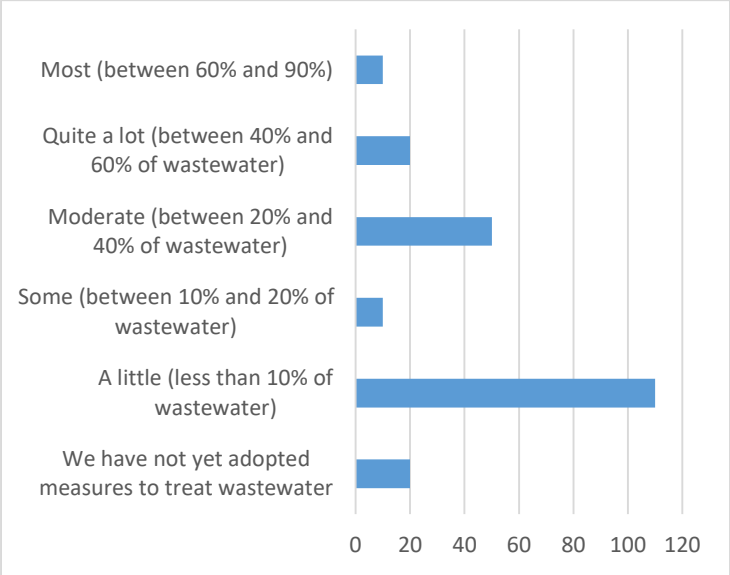
Restaurants that have adopted water treatment measures



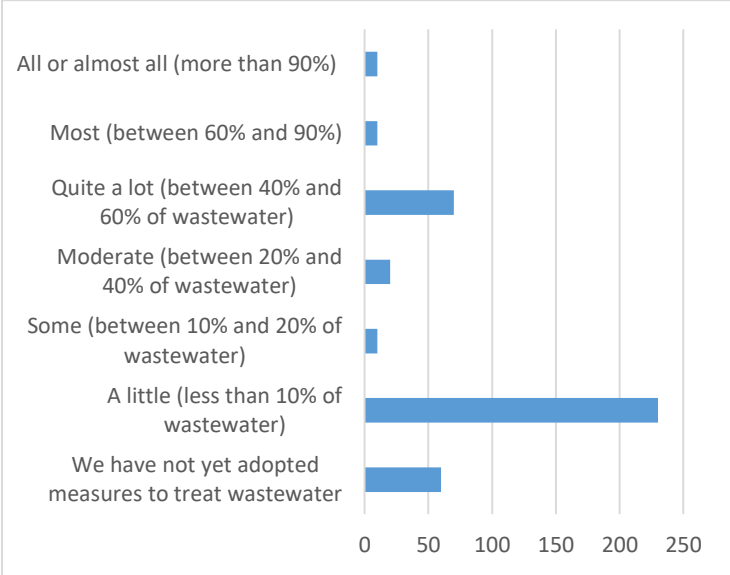
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

6.1.1 Volume of wastewater that establishments estimate to have been treated

Water treatment measures adopted in hotels



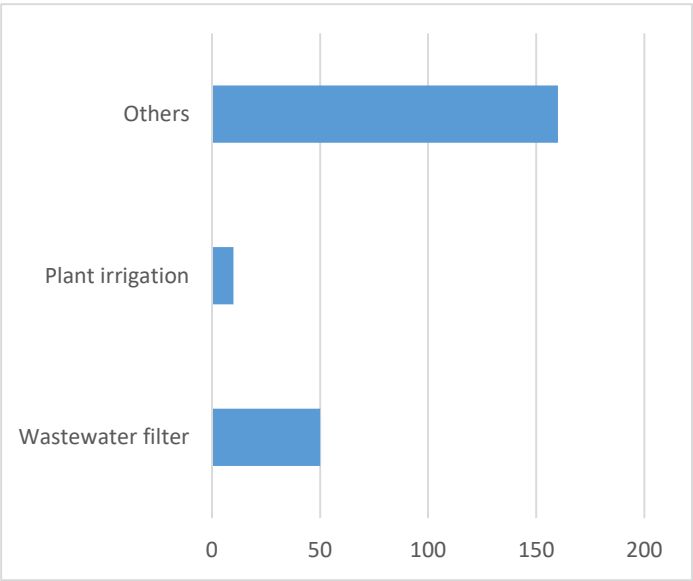
Restaurants that have adopted water treatment measures



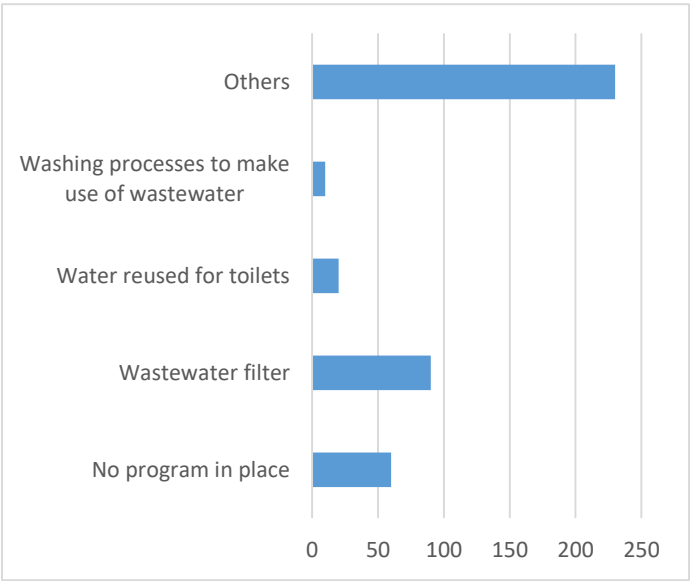
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

6.1.2 Methods used by establishments to ensure responsible wastewater treatment

Water treatment measures adopted in hotels



Restaurants that have adopted water treatment measures



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

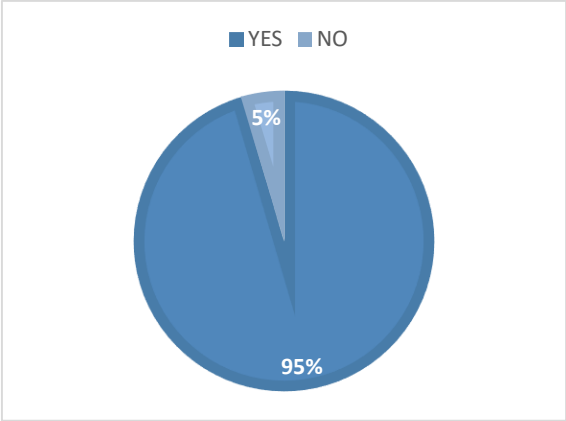
6.2 HOTELS AND RESTAURANTS THAT RECYCLE THE WASTEWATER THEY PRODUCE

Objective: To know the progress in the number of establishments that are taking measures to recycle wastewater, contributing to better water management.

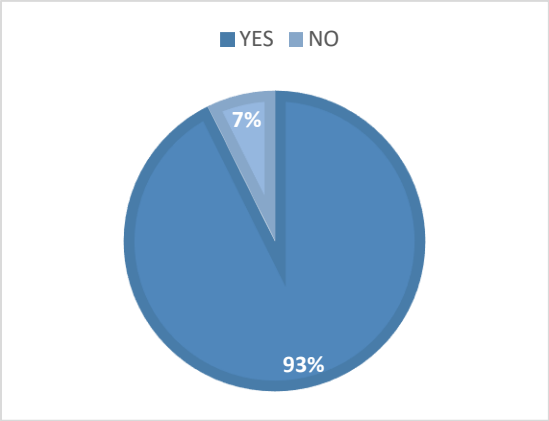
Description: Percentage of establishments that have implemented measures to recycle the wastewater they generate.

Quarterly periodicity

Hotels that recycle wastewater



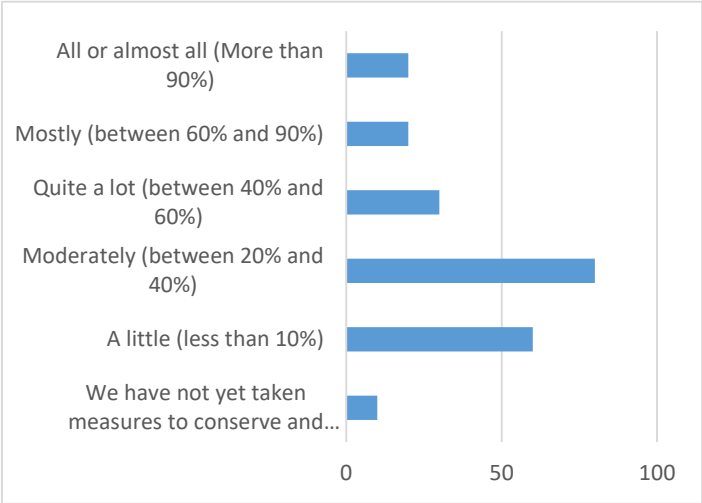
Restaurants that recycle wastewater



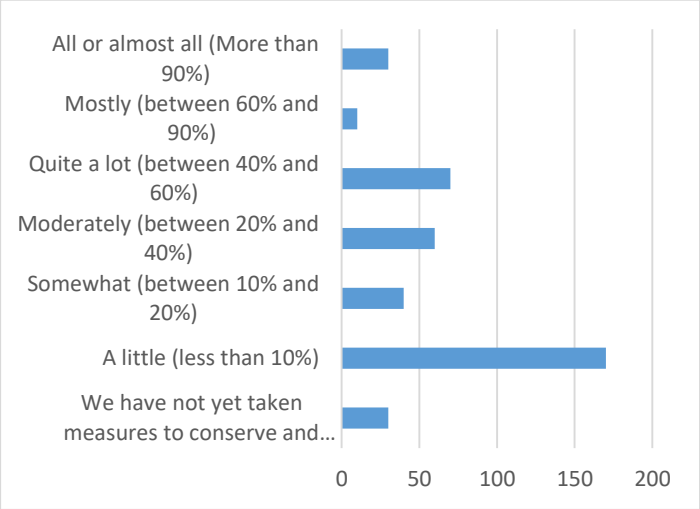
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

6.2.1 Volume of water recycled for other uses in establishments

Hotels that recycle wastewater



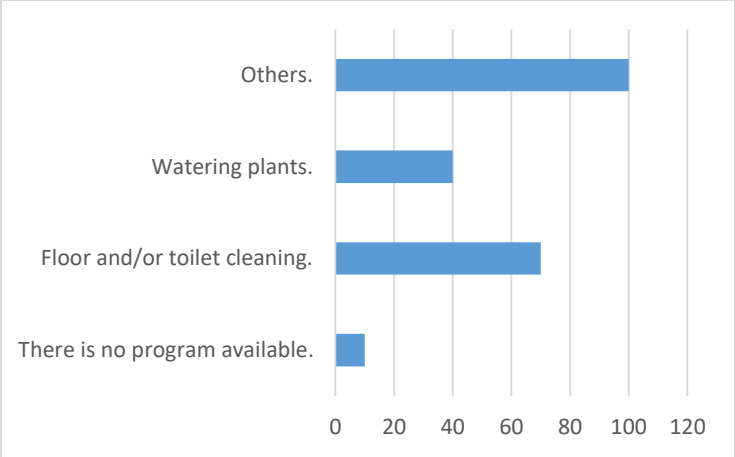
Restaurants that recycle wastewater



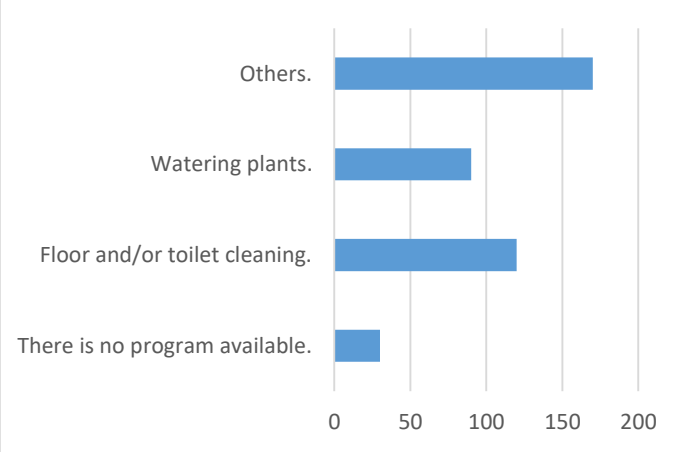
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

6.2.2 Main uses of recycled water:

Hotels that recycle wastewater



Restaurants that recycle wastewater



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

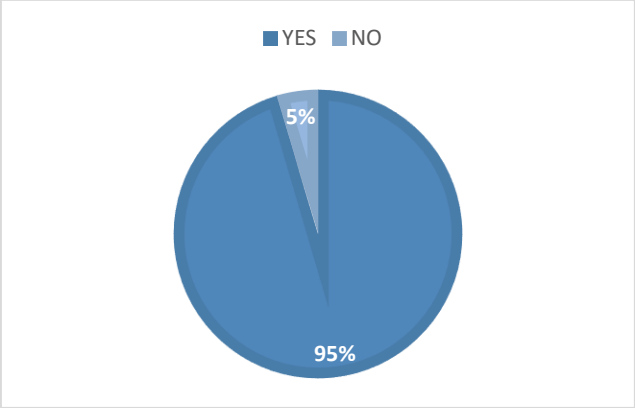
7. SOLID WASTE MANAGEMENT

7.1 HOTELS AND RESTAURANTS THAT CARRY OUT SOLID WASTE SEPARATION

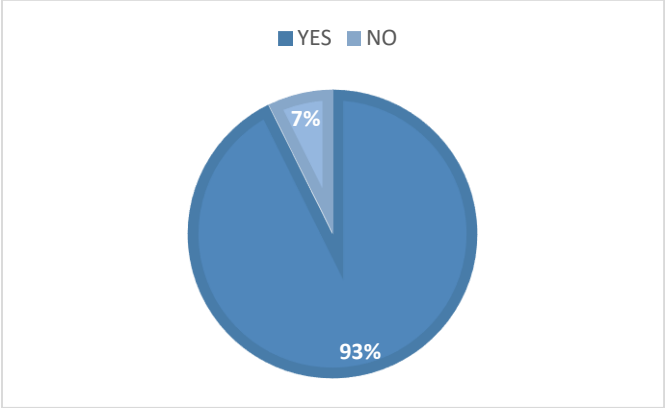
Objective: To determine the progress in the number of establishments that carry out solid waste separation practices for better management of solid waste.

Description: Percentage of establishments that carry out solid waste separation.
Sample size: 220 hotels and 410 restaurants
Quarterly periodicity

Hotels that separate garbage



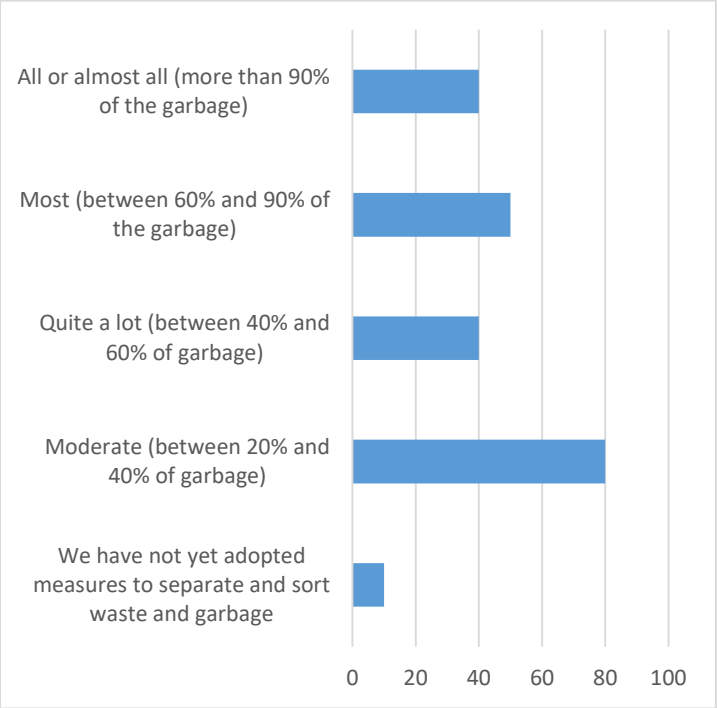
Restaurants that separate garbage



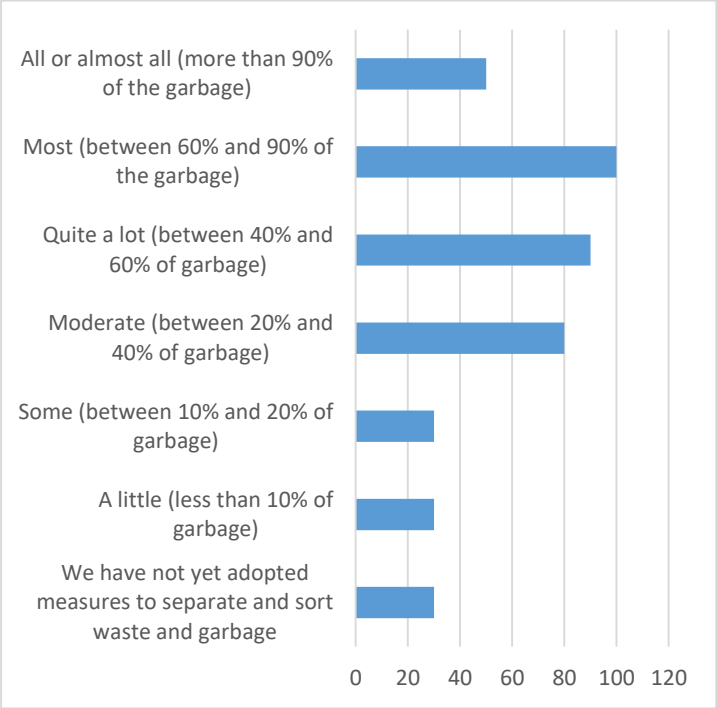
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

7.1.1 Percentage and estimate of garbage and solid waste that is separated and sorted in establishments

Hotels that separate garbage



Restaurants that separate garbage



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

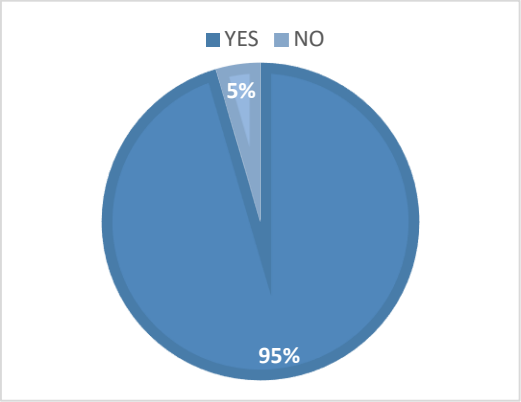
7.2 HOTELS AND RESTAURANTS THAT RECYCLE SOLID WASTE

Objective: To determine the progress in the number of establishments that carry out solid waste recycling practices, in order to better manage and make use of solid waste.

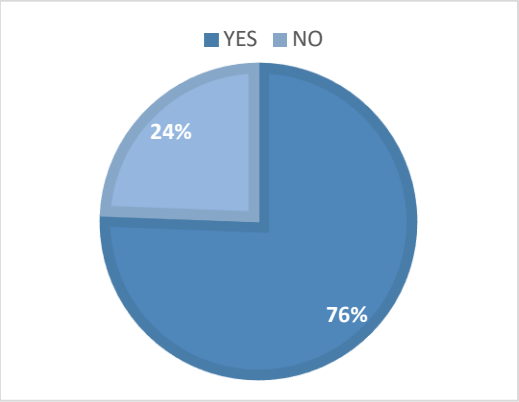
Description: Percentage of establishments that recycle solid waste.

Quarterly periodicity

Hotels that recycle solid wastes



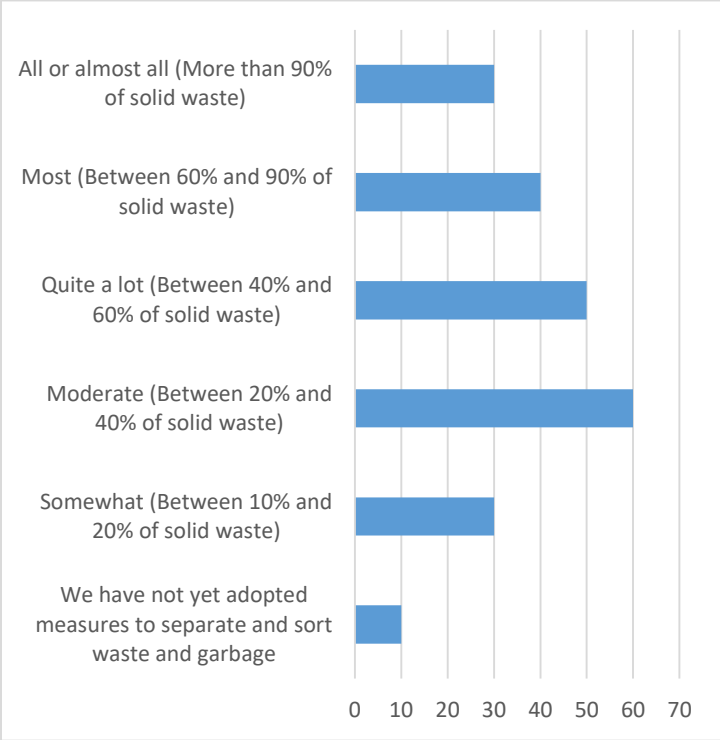
Restaurants that recycle solid wastes



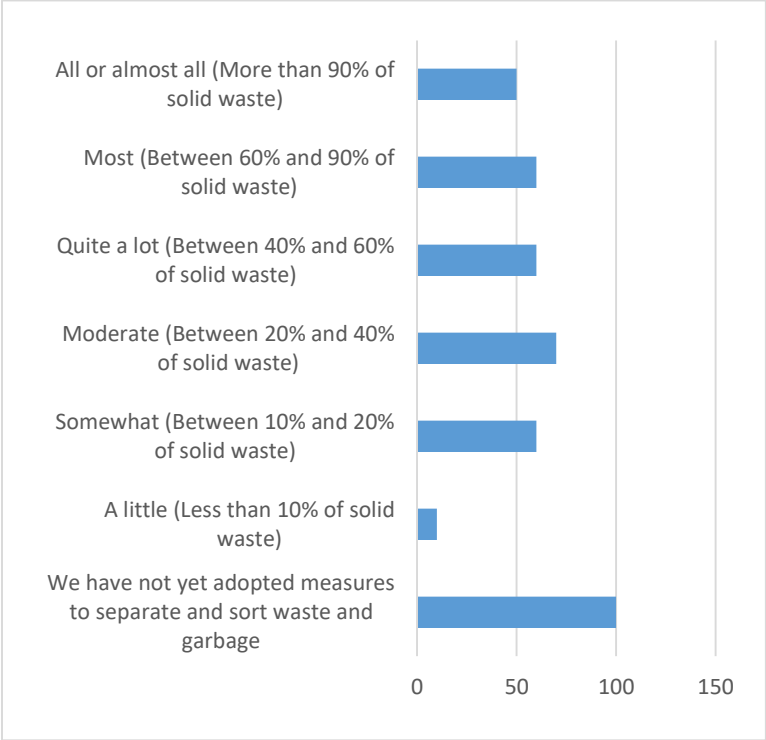
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

7.2.1 Percentage of solid waste generated by establishments that is estimated to be recycled

Hotels that recycle solid wastes



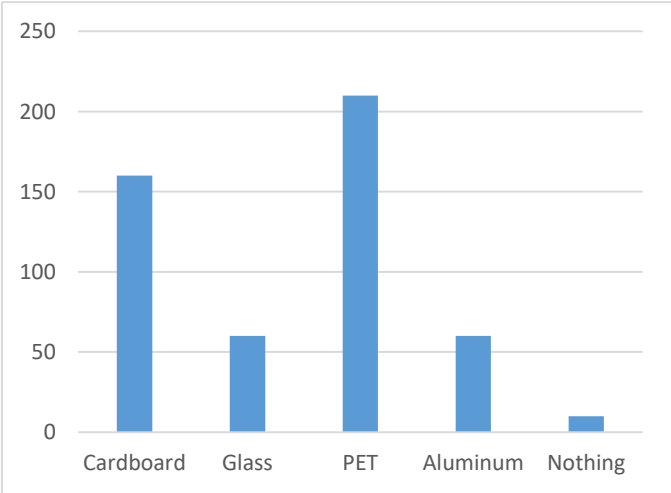
Restaurants that recycle solid wastes



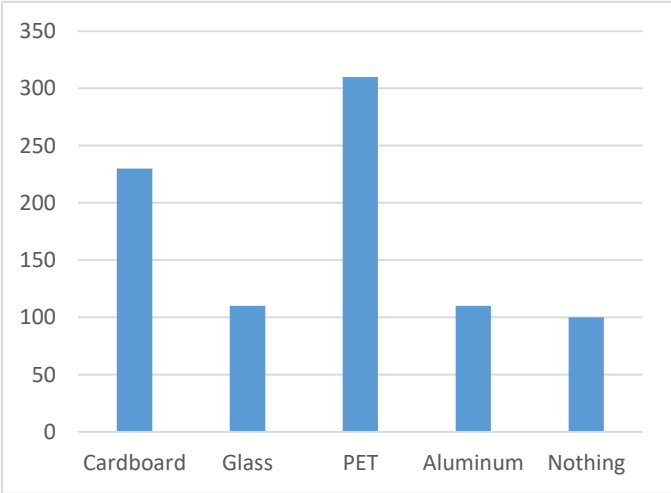
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

7.2.2 Main products that are recycled

Hotels that recycle solid wastes



Restaurants that recycle solid wastes



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

8 CLIMATE ACTION

8.1 CARBON FOOTPRINT GENERATED BY THE MAIN TOURIST EVENTS IN THE DESTINATION.

This indicator is under development.

8.2 PERCENTAGE OF ENERGY FROM POLLUTING FUELS (FOSSIL) IN TOURIST ESTABLISHMENTS

This indicator is under development.

8.3 PERCENTAGE OF NON-POLLUTING PUBLIC TRANSPORT (ELECTRIC TRANSPORT) IN THE DESTINATION.

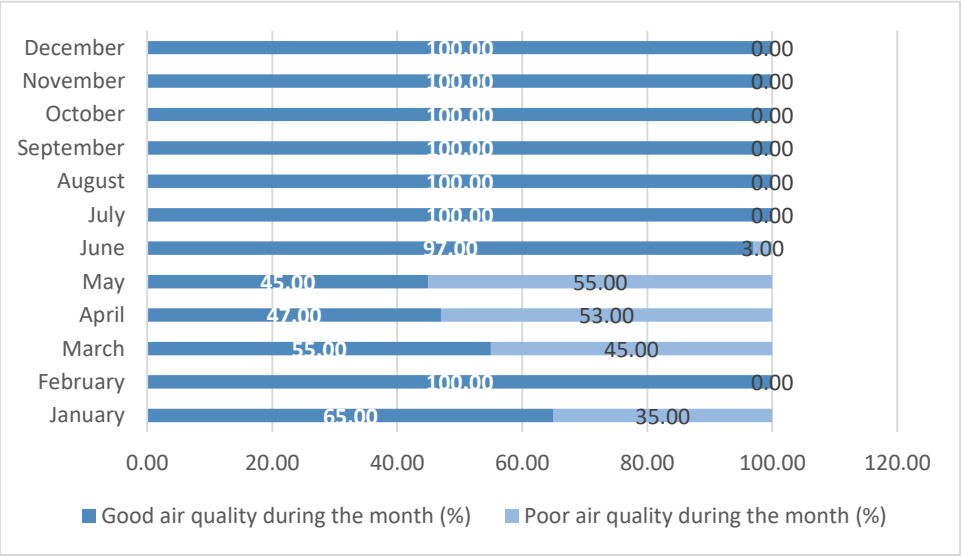
This indicator is under development.

8.4 AIR QUALITY IN TOURIST DESTINATIONS IN THE STATE.

Objective: Measuring air quality in the tourist destination of the capital of Tlaxcala.

Description: It measures the percentage of days when the air quality was good at the destination.

Air quality is primarily determined by the National Air Quality Information System (SINAICA), operated by the National Institute of Ecology and Climate Change (INECC) and overseen by SEMARNAT. Measurements are taken at state and municipal monitoring stations, in accordance with the Official Mexican Standards (NOM) that establish limits and evaluation methods as outlined in the Atmospheric Monitoring Manuals in Mexico.
https://sinaica.inecc.gob.mx/pags/guias.php



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

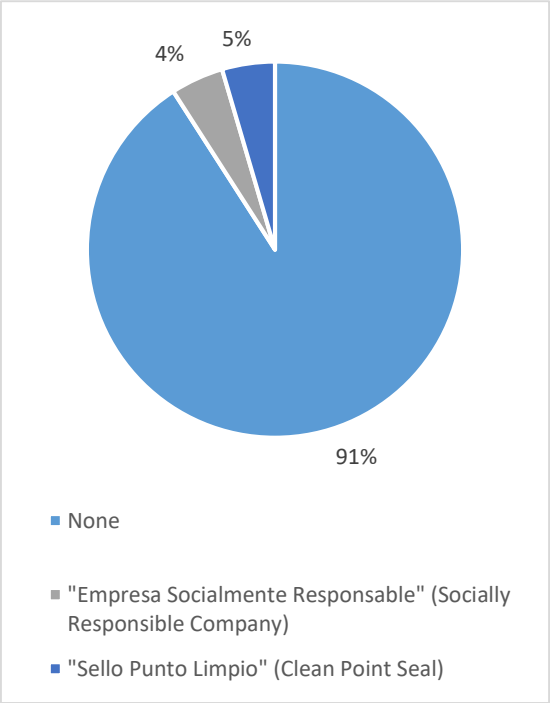
8.5 HOTELS AND RESTAURANTS THAT HAVE ANY OF THE FOLLOWING ENVIRONMENTAL PROTECTION CERTIFICATION OR EQUIVALENT

Objective: To determine the progress in the number of establishments that have been certified in environmental conservation or protection, contributing to the protection of the environment and the dissemination of a culture of sustainability.

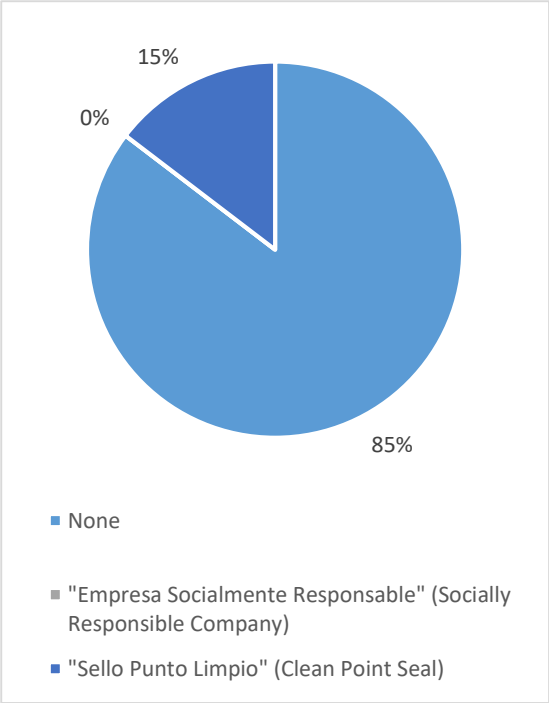
Description: Percentage of establishments that have been certified in environmental protection and conservation practices or measures.
Sample size: 220 hotels and 410 restaurants

Quarterly periodicity

Hotels that have an environmental protection certification or equivalent.



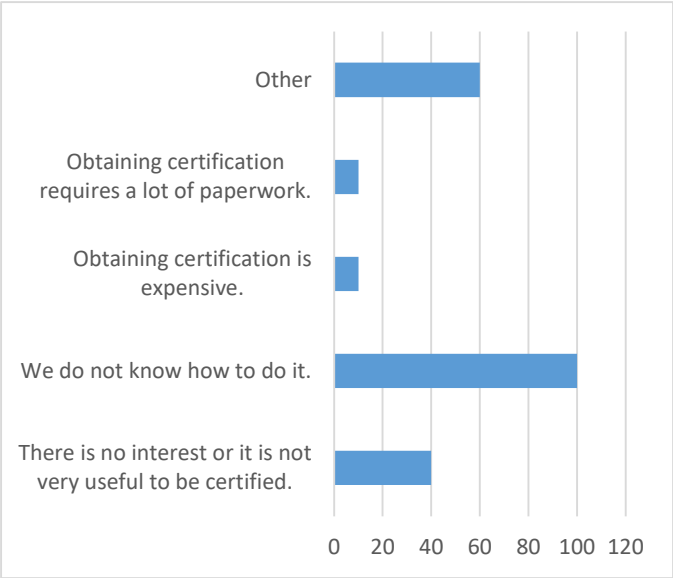
Restaurants that have an environmental protection certification or equivalent.



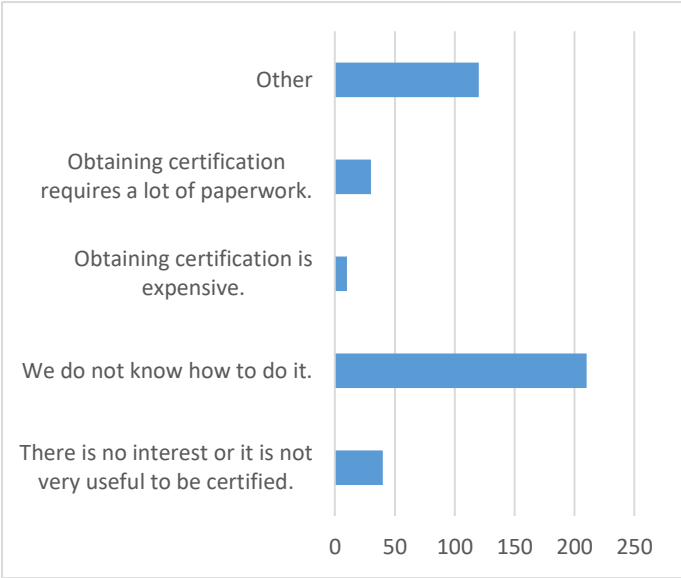
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

8.6 REASONS WHY THEY DO NOT HAVE SUSTAINABILITY CERTIFICATES OR LABELS.

Hotels that have an environmental protection certification or equivalent.



Restaurants that have an environmental protection certification or equivalent.



8.7 NUMBER OF TOURIST ESTABLISHMENTS LOCATED IN VULNERABLE AREAS

This indicator is under development.

9 ACCESSIBILITY

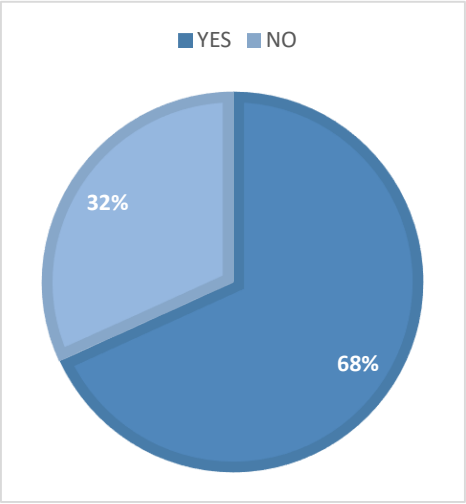
9.1 ESTABLISHMENTS THAT HAVE ACCESSIBLE AND ADAPTED FACILITIES TO ENSURE THE USE AND MOVEMENT OF PEOPLE WITH PHYSICAL DISABILITIES.

Objective: To determine the progress in the number of establishments that have facilities adapted to the needs of people with disabilities.

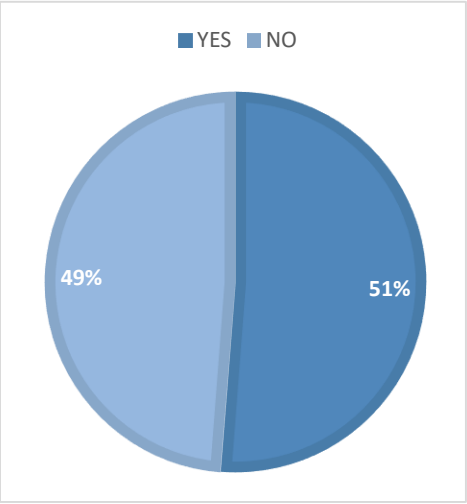
Description: Percentage of establishments with appropriate facilities for people with physical disabilities.
Sample size: 220 hotels and 410 restaurants

Quarterly periodicity

Hotels



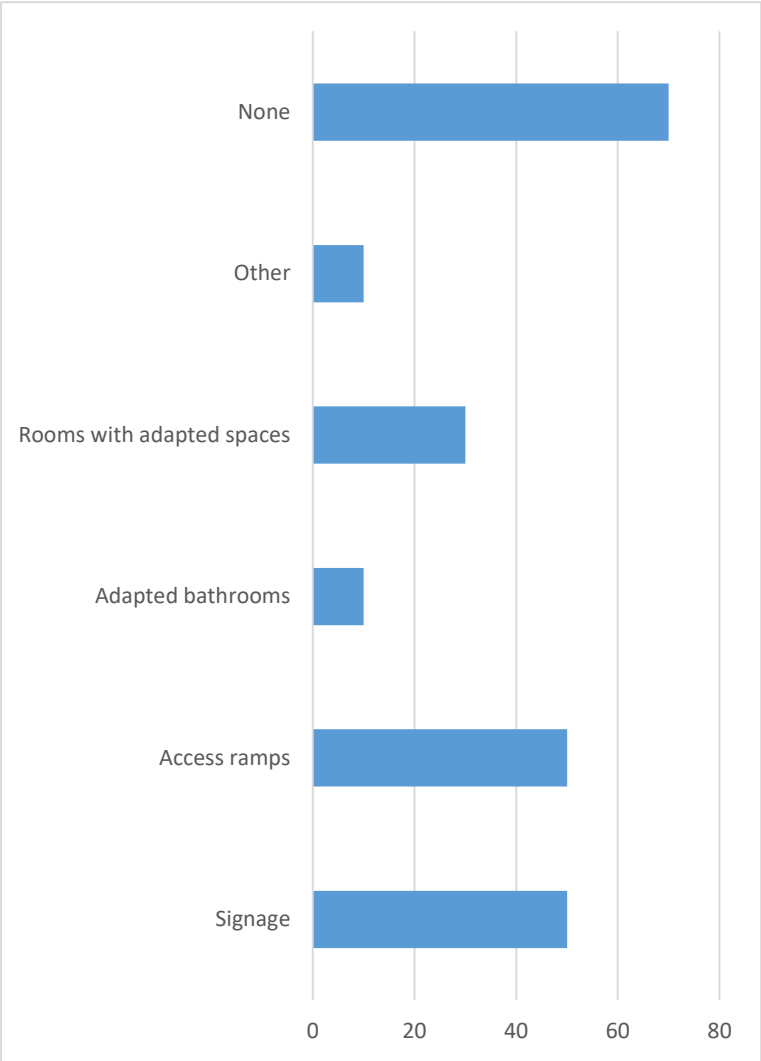
Restaurants



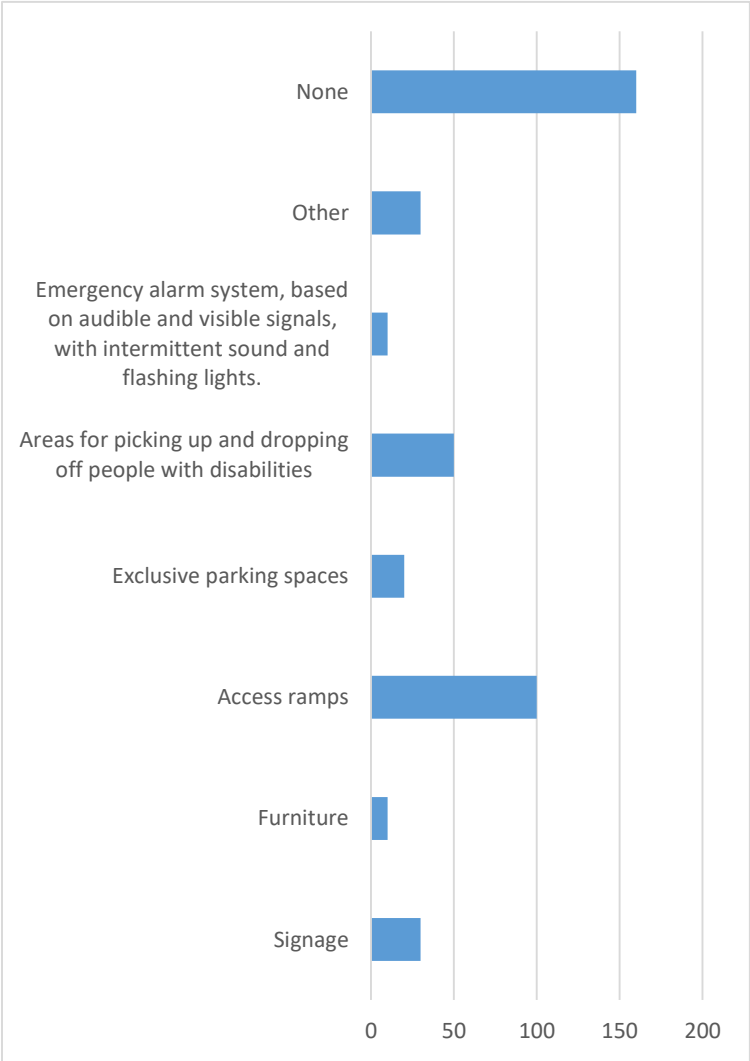
Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

9.2 TYPE OF FACILITIES AND ADAPTATIONS IMPLEMENTED IN ESTABLISHMENTS TO FACILITATE ACCESS, MOVEMENT, AND USE OF SERVICES BY PERSONS WITH DISABILITIES.

Hotels



Restaurants



Source: Own elaboration, based on information provided by the State's Tourism Service Providers.

10. LOCAL SATISFACTION

In 2023, surveys were conducted among community residents regarding their level of satisfaction with tourism; the results were presented in the 2024 Annual Report of the Tlaxcala Sustainable Tourism Observatory.

11. GOVERNANCE

Meetings were held with the Executive Committee of the Tlaxcala Sustainable Tourism Observatory, during which the following working groups were formed:

A. *Technical Scientific Group:*
   i. *SECTURE*
   ii. *INEGI*
   iii. *Universities (Autonomous University of Tlaxcala UATX and The "College of Tlaxcala" COLTLAX)*

B. *Economy and Tourism Group: Tourism seasonality, employment, and economic benefits.*

   i. *SECTURE*
   ii. *INEGI*
   iii. *Association of Hotels and Motels of the State of Tlaxcala*
   iv. *National Chamber of the Restaurant and Seasoned Foods Industry Tlaxcala Delegation*
   v. *National Chamber of Commerce, Services, and Tourism in Tlaxcala*
   vi. *STyC*
   vii. *Secretariat of Culture of the State of Tlaxcala*

C. *Environment Group: Energy management, water management, wastewater management, solid waste management, and climate action.*

   i. *SECTURE*
   ii. *INEGI*
   iii. *SMA*

D. *Social Group: Accessibility, governance, and local satisfaction with tourism.*

   i. *SECTURE*
   ii. *State System for Integral Family Development*
   iii. *Association of Hotels and Motels of the State of Tlaxcala*
   iv. *Universities (Autonomous University of Tlaxcala UATX and The "College of Tlaxcala" COLTLAX)*

E. Tourist Knowledge Group

i. SECTURE
ii. Universities (Autonomous University of Tlaxcala UATX and The "College of Tlaxcala" COLTLAX)

During the working sessions, proposals for improvement were presented to strengthen the measurement and analysis of tourism indicators, as detailed below:

Indicator Name	Improvement Proposal	Source of Information	Feasibility 2025
Tourist arrivals by market	Include zone (urban), tourist center, and category in the technical sheet of the indicator.	Tourism Observatory; lodging establishment records	High
Tourist arrivals by destination	Disaggregate national and foreign tourists in Tlaxcala, Apizaco, and Huamantla.	Tourism Observatory; local records	Medium
Visitors to Archaeological Sites	Disaggregate national and foreign visitors; include museums and zoos.	INAH; state museums; state zoo	High
Growth of tourism employment	Meetings with INEGI; publication schedule; support from the STyC.	INEGI; STyC.	High
Private investment	Support from associations and chambers of commerce to raise awareness among their members.	Business associations; chambers of commerce	Medium
Environmental indicators	Support from associations and chambers of commerce to share information on energy, water, solid waste, and accessibility.	Tourism enterprises; business chambers	Medium
Environmental certification or distinctive	Coordination between SECTURE, SMA, PROFEPA, and PSTs to implement the Environmental Quality Distinctive.	SECTURE; SMA; PROFEPA	High
Air quality in Apizaco and Tlaxcala	Use information published by SMA and improve its interpretation.	SMA	High
Local satisfaction with tourism and tourist profile	Application of surveys based on a defined methodology.	Tourism Observatory; applied surveys	High

ANALYSIS OF RESULTS

The report reflects sustained growth in tourism in Tlaxcala during 2024, with progress in economic, social, and environmental indicators.

Economic and Demand Results

Tourism is growing in volume and revenue, but short stays and low occupancy rates limit its potential. Private investment is concentrated in accommodation, with weak diversification of services.

- Tourist arrivals: 375,674 in 2024 (+5.63% vs. 2023).
    - 93.25% domestic, 6.75% international.
- Visitors to attractions: 2.67 million, with a strong emphasis on theme parks and cultural/sporting events.
- Average stay: 1.53 nights (+3.38%).
- Hotel occupancy: 33.48% (moderate, reflecting idle capacity).
- Economic impact: 738.7 million pesos (+11.4%).
- Private investment: growth in lodging, but decline in food and complementary services.
- Lodging tax: slight decline (-3.65%), suggesting challenges in collection.

Employment and Social Participation

Tourism generates stable employment, with strong female participation, but its dynamism is lower than the state average. This indicates a need for professionalization and job diversification.

- Tourism employment: 38,429 people (6.12% of state employment).
- Women in tourism: 57.95% (22,269), showing a highly feminized sector.
- Tourism employment growth: +1.08%, lower than total state growth (+3.31%).

Environmental Management

There has been clear progress in energy and water, but treatment and recycling systems are still in their infancy. The challenge is to move from basic measures to comprehensive management and environmental certification.

- Energy:
  - 220 hotels and 400 restaurants implement energy-saving measures.
  - 370 restaurants and 190 hotels generate renewable energy.
  - Energy savings of between 10–50% through the use of energy-saving light bulbs and solar panels.
- Water:
  - 340 hotels and 210 restaurants implement water-saving measures.
  - Strategies: water-saving taps, recycling, rainwater harvesting.
- Wastewater:
  - 200 hotels and 350 restaurants with treatment.
  - Recycling still limited, with most at low levels of reuse.
- Solid waste:
  - Separation and recycling in hotels and restaurants, but consolidated information is lacking.
- Climate actions:
  - The need to measure the carbon footprint of events and dependence on fossil fuels is recognized.

Accessibility and Governance

Governance is robust and multisectoral, but accessibility and local satisfaction require further detail and follow-up.

- Establishments with infrastructure adapted for people with disabilities are reported.
- Governance: participation of the public, private, and academic sectors in the Executive Committee.
- Improvement strategies: methodologies for carbon footprint, inter-institutional collaboration, training for providers.

Areas of Opportunity

- Short stays and low hotel occupancy
  - Design strategies to extend visits.
- Collection of lodging tax
  - Improve control and enforcement mechanisms.
- Less dynamic tourism employment
  - Promote training and diversification.
- Partial environmental management
  - Strengthen wastewater and solid waste recycling.
- Carbon footprint measurement and clean transportation
  - In tourist establishments (hotels, restaurants, recreation centers)
    - Inventory of direct and indirect emissions
      - Electricity and thermal energy consumption.
      - Fuel use in own transportation (shuttles, tours).
      - Solid waste and wastewater generation.
    - Suggested indicators
      - CO_2 emissions per occupied room.
      - Emissions per visitor served.
      - Energy intensity (kWh per guest).
    - Practical tools
      - Measurement protocols such as ISO 14001
      - Integration with environmental certifications (SECTUR "S" Distinction, EarthCheck).
  - At mass events (fairs, festivals, conferences)
    - Relevant emission sources
      - Transportation of attendees and assembly logistics.
      - Electricity consumption for lighting, sound, and air conditioning.
      - Food and waste generated.
    - Suggested indicators
      - Emissions per attendee (kg CO_2 eq/person).
      - Emissions per hour of event.
      - Percentage of recycled waste vs. total waste.
    - Best practices
      - Recording attendee mobility (surveys on origin-means of transport).
      - Use of temporary renewable energy (mobile solar panels).
      - Waste management plan with separation and composting.

- Implement strengthening strategies in the state
  - Tlaxcala Sustainable Tourism Observatory: Integrate specific carbon footprint indicator sheets for establishments and events.
  - Sector training: Workshops for hoteliers, restaurateurs, and event organizers on measurement methodologies.
  - Demonstration pilots: Select a cultural festival and a group of hotels in a tourist center to apply measurement and publish results as a reference.

- Accessibility and local satisfaction
  - Measuring tourism accessibility
    - Key indicators
      - Percentage of establishments with universal accessibility
      - Accessibility in tourist transport: % of vehicles with ramps, wheelchair spaces, or inclusive signage.
      - Availability of accessible information: % of websites and tourist materials with Braille, audio, or easy-to-read versions.
    - Measurement methods
      - Physical inspections of infrastructure (hotels, museums, restaurants).
      - Surveys of people with disabilities and older adults on perceived barriers.
      - Development of technical accessibility standards.
  - Measurement of local satisfaction
    - Key indicators
      - Citizen perception index of tourism: Periodic surveys on perceived benefits and impacts.
      - Community cost-benefit balance: % of population that considers tourism to improve their quality of life.
      - Community participation in tourism events: Number of local actors involved in fairs, festivals, and tourism projects.
    - Measurement methods
      - Satisfaction surveys in host communities.
      - Focus groups with merchants, artisans, and service providers.
      - Monitoring of local social media to capture spontaneous perceptions.

- Improvement strategies
  - Accessibility
    - Tax incentives for establishments that adapt their infrastructure.
    - State manual on tourism accessibility with clear standards.
    - Training programs for tour operators on inclusive service.
  - Local satisfaction
    - Community dialogue tables before major events.
    - Transparency in economic benefits (e.g., % of local suppliers hired).
    - Community tourism programs that integrate local artisans and producers.

TLAXCALA
UNA NUEVA HISTORIA
2021 - 2027

SECTURE
SECRETARÍA DE TURISMO
DE TLAXCALA

OBSERVATORIO TURÍSTICO SUSTENTABLE DE TLAXCALA

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TLAXCALA
TAN MÁGICA, QUE NO CREERÁS QUE EXISTE

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