



# LOS CABOS TOURISM OBSERVATORY

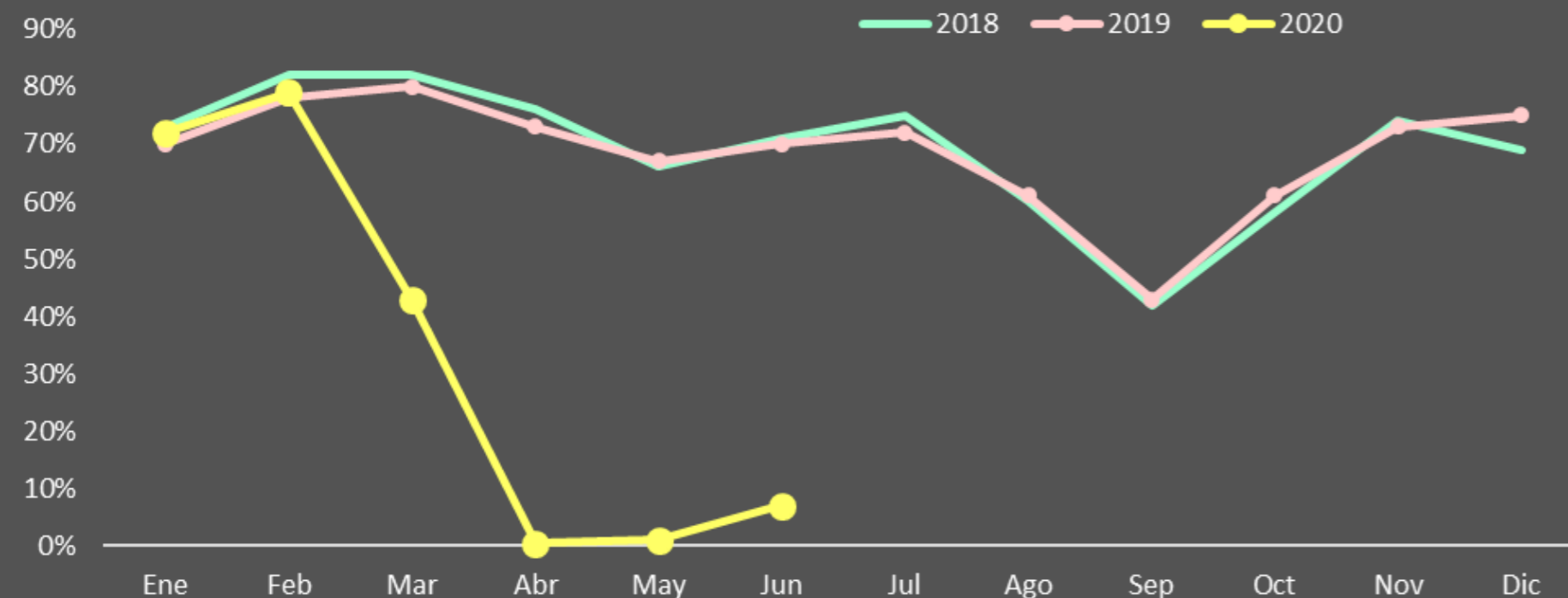
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## KEY PERFORMANCE INDICATORS

JULY 202

# Main indicators – Summary

## Hotel Activity



SOURCE: LOS CABOS HOTEL ASSOCIATION

**Rooms Available**  
(May-2020):

**22,014**

**+8.8%**

(vs. May-2019)

SOURCE: DATATUR

**Hotel Occupancy**  
(Jun-2020):

**7%\***

**-63pp**

(vs. Jun-2019)

SOURCE: AHLC

\*Occupancy following reopening.

**Room nights**  
(May-2020):

**2,485**

**-99.7%**

(vs. May-2019)

SOURCE: DATATUR

## Air Passenger Arrivals

**Total Passengers**

(Jun-2020, expressed in thousands):

**29.5**

**-87.8%**

(vs. Jun-2019)

**National Passengers**

(Jun-2020, expressed in thousands):

**18.15**

**-78.4%**

(vs. Jun-2019)

**International Passengers**

(Jun-2020, expressed in thousands):

**11.35**

**-92.8%**

(vs. Jun-2019)

SOURCE: GAP

**Group Business Total**  
RFPs (Jun-2020):

**6**

**-29 RFPs**

(vs. Jun-2019)

**Tourist Surveys**

Tourist Satisfaction (more than expected, Jun-2020):

**39.7%**

**+1.1pp**

(vs. Jun-2019)

**Cruise passengers**

(May-2020):

**0**

**-100%**

(vs. May-2019)

**Attendees to congresses and conventions**  
(Jun-2020):

**N.D.**

**Tourists' Origin**

(Jun-2020):

**70.7% foreigners**

**-5pp**

(vs. Jun-2019)

**Cruise ships**

(May-2020):

**0**

**-7 cruises**

(vs. May-2019)

SOURCE: DATATUR

# Main indicators – Summary

## PASSENGERS ARRIVAL

- In Jun-2020, Los Cabos International Airport registered a 87.8% (-213 thousand) decrease in the total number of passengers arriving at the destination compared to Jun-2019, adding up to a total of 29.5 thousand (when considering arrivals only).
  - Passengers on domestic flights (18.15 thousand) represent 61.5% of total arrivals. These decreased by 78.4% (-65.9 thousand vs. Jun-2019).
  - Passengers on international flights (11.35 thousand) represent 38.5% of total arrivals. These decreased by 92.8% (-147.3 thousand vs. Jun-2019).
  - The number of passengers tripled compared to May.

## FLIGHT SCHEDULES

- Compared to the same period last year, the domestic market has 5.6% fewer available seats scheduled for Jul-Dic-2020. 25.2% fewer seats are expected for Jul-2020.
  - CDMX and GDL seats decreased by 6.2% and 17.6%, respectively. TIJ increased by 19.5%, and MTY by 3.3%.
- The United States market expects 17.4% fewer seats scheduled for the next 6 months. In Jul-2020, there are 55.2% less. HOU (-24%) and San Diego (-46%) had the most significant decrease. LAX and DFW were less affected, with -12.2% and -12.3%, respectively.
- From Canada, 17.4% fewer seats are expected for the next 6 months. There are 46.8% fewer seats scheduled for Jul-2020. Calgary drops 5.9%, Vancouver 14.7%, and Toronto 30.3%.

## FLIGHT SCHEDULES (Cont'd)

- It should be noted that the scheduling of flight seats for all 2020 is falling 32.6% in CUN and 24.6% in PVR. However, SJD fell 21.9% when compared to 2019.

## HOTEL ACTIVITY

- Occupancy in Jun-2020 was 7%, compared to 70% in Jun-2019 (-63pp). This occupancy follows the reopening of the destination (25 hotels as of June 15<sup>th</sup>, and 47 hotels as of June 30<sup>th</sup>).
  - Cabo San Lucas' occupancy drops 72pp when compared to Jun-2019 and now stands at 8%.
  - San Jose del Cabo registers 6% (57pp less than in Jun-2019).
  - Los Cabos Corridor registered 3% (52pp less).
- The number of available rooms increased by 8.8% in Los Cabos between May-2019 and May-2020. Los Cabos Corridor registered the highest growth with 8.9%.
- Tourist arrivals to hotels in Los Cabos decreased by 99.7% (-196 thousand) between May-2019 and May-2020.
  - Domestic tourism fell 99% (-54.7 thousand), and international tourism dropped 100% (-141.4 thousand).
  - There were 2,485 thousand occupied room nights in May-2020, 99.7% less compared to Mar-2019 (-958,7 thousand nights).

## TOURIST SURVEYS

- In Jun-2020, 39.7% of tourists rated their experience in Los Cabos as better than they expected (1.1pp more than in Jun-2019).

## CRUISE SHIP ARRIVALS

- There were no registered vessel or cruise ship arrivals at the Port of Cabo San Lucas in May-2020.

## ADVANCE RESERVATIONS

- As of July 14<sup>th</sup>, the volume of flight bookings throughout Jul-2020 is expected to fall by 78%. This drop will show a 3pp decrease for flights in Aug-2020.
- The volume of bookings from the international market fell drastically: this decrease will reach 80% during Jul-2020, while the domestic market will have a 53% decline.
- There will be a 49% decrease in the international market trips for Nov-2020; however, the domestic market will drop 12% with respect to last year.



# LOS CABOS TOURISM OBSERVATORY

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## THE IMPACTS OF COVID-19

Report on the effects of COVID-19 on  
Mexico's tourism sector.

# Weekly recovery rate

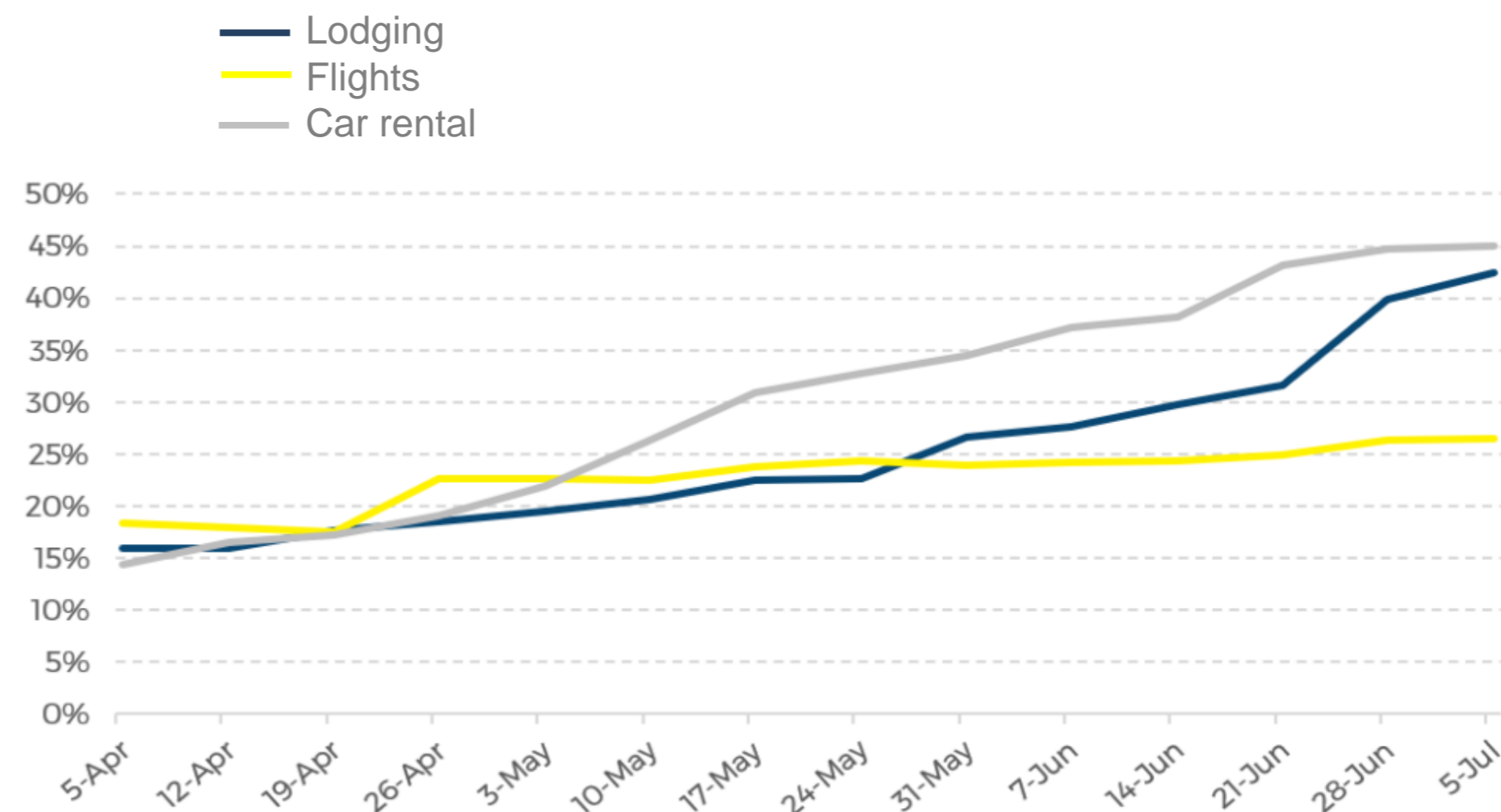
Weekly change percentage, 2020

	7 June	14 June	21 June	28 June	5 July
France	↑ 4%	↑ 12%	↑ 7%	↑ 21%	↑ 7%
Spain	↑ 18%	↑ 5%	↑ 7%	↑ 5%	↑ 6%
Italy	↑ 11%	↑ 11%	↑ 10%	↑ 14%	↑ 8%
U.K.	↑ 3%	↑ 9%	↑ 25%	↑ 7%	↑ 1%
Germany	↑ 2%	↑ 7%	0%	↑ 12%	↑ 4%
Mexico	↑ 9%	0%	↑ 7%	↑ 3%	↑ 5%
Brazil	↓ -1%	↑ 10%	↓ -12%	↑ 24%	↑ 7%
Canada	↑ 7%	↓ -1%	↑ 14%	↑ 20%	↑ 9%
Asia	↓ -3%	↑ 2%	↑ 3%	↑ 19%	↑ 7%

Skift presents the recovery index of different markets, with the U.S. as the issuing market.

- In recent weeks, the highest percentages were recorded towards European destinations such as Italy and France.
- In the case of Mexico, the percentages of change from the last 3 weeks have been positive.

Weekly evolution of reservations, 2020



- Flight reservations, albeit slightly, are finally starting to show an upward trend.
- Accommodation reservations took off as of June 21<sup>st</sup>.



# LOS CABOS TOURISM OBSERVATORY

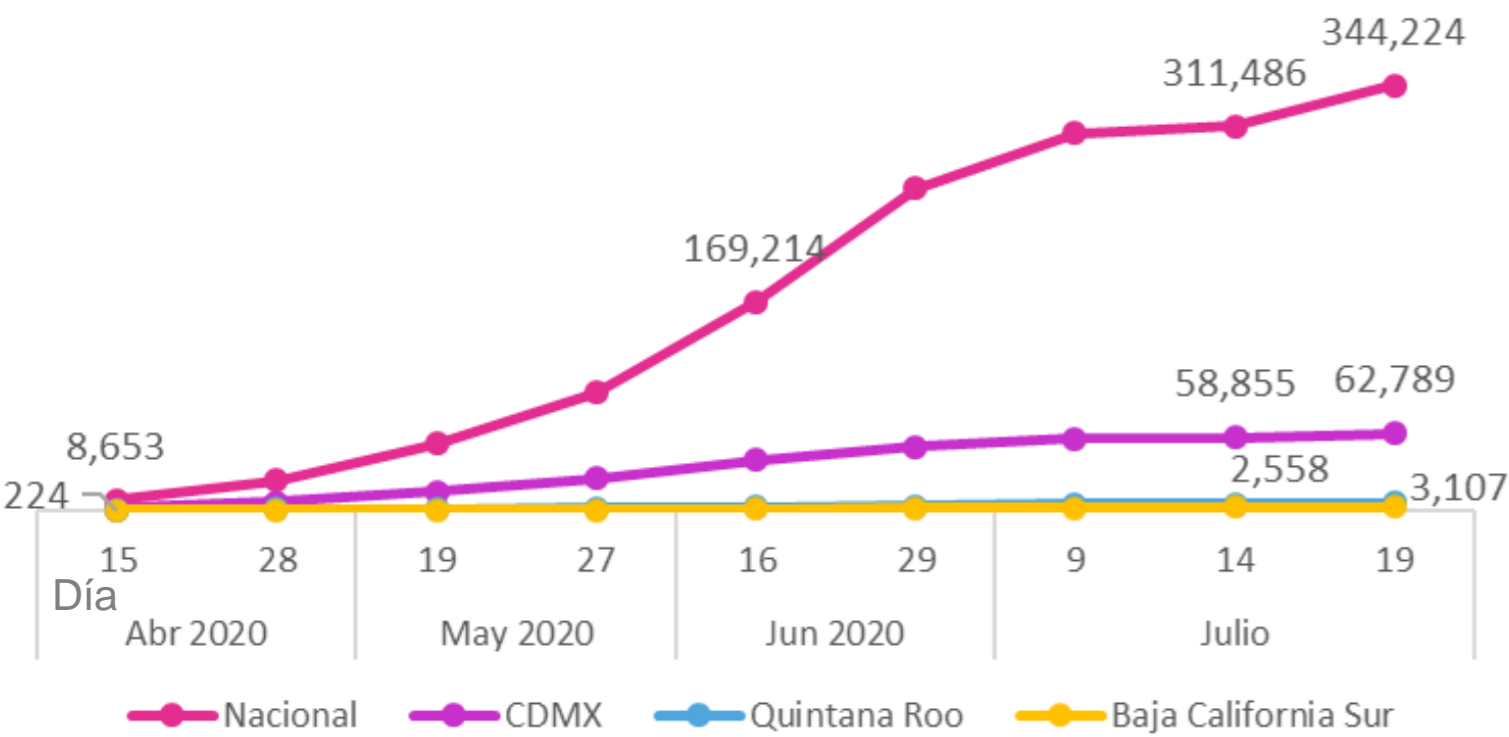
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## THE IMPACTS OF COVID-19

Report on the effects of COVID-19 on  
Mexico's tourism sector.

# Confirmed COVID-19 cases overview

Confirmed cases (cumulative)

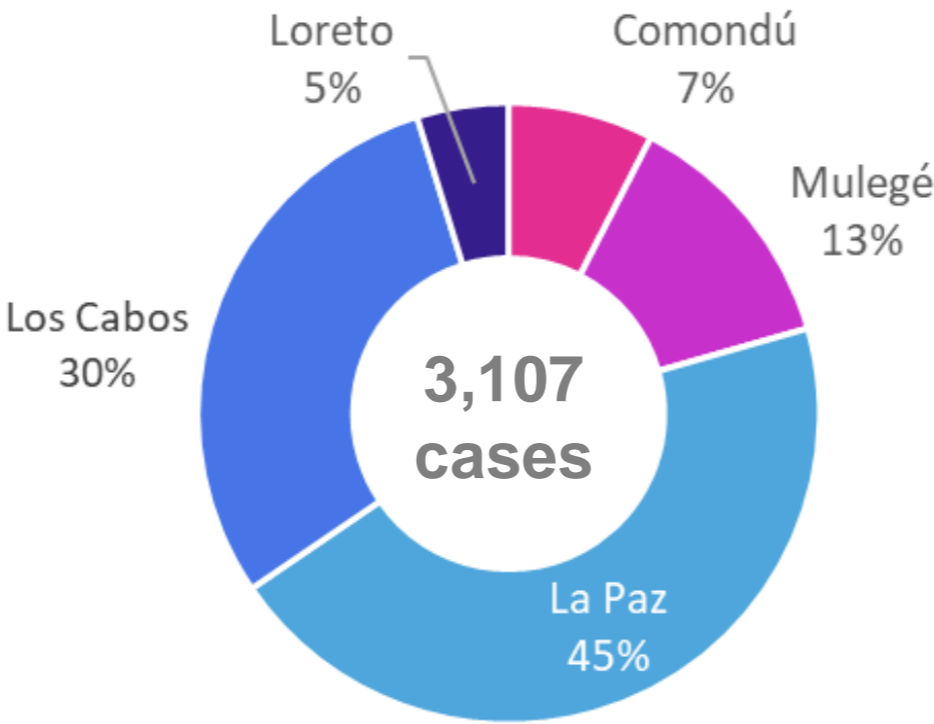


As of July 19<sup>th</sup>, 2020, there are **344,224 confirmed cases** in Mexico.

Ranking

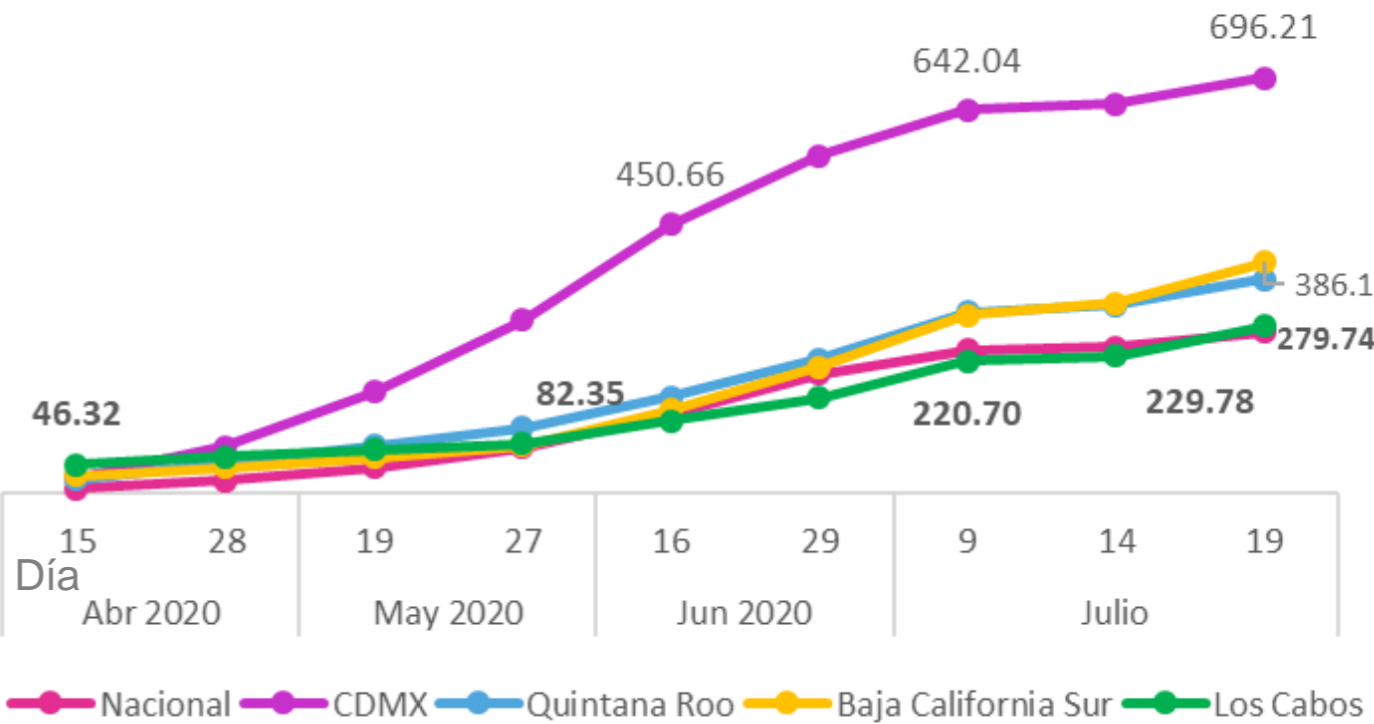
May 19	Jun 19	Jul 19	
1	1	1	Mexico City: 62,789 cases.
4	↓ 5	↓ 6	Quintana Roo: 6,161 cases.
6	↓ 9	↑ 4	Baja California Sur: 3,107 cases.

Confirmed cases by municipalities in B.C.S.



- 75% of the state’s confirmed cases are concentrated between La Paz and Los Cabos (1,395 and 924 cases, respectively), of which:
  - La Paz has 888 active cases.
  - Los Cabos has 427 active cases.

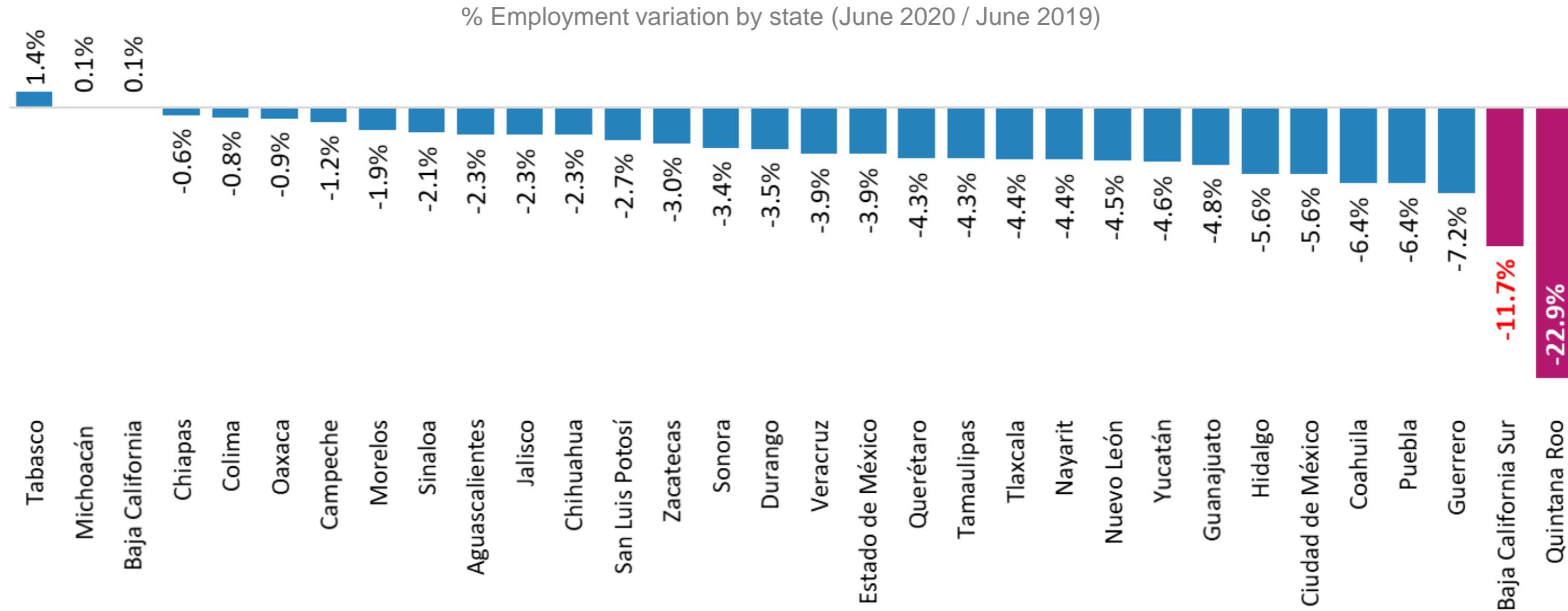
Incidence of infection



- The national average rate of infection is **269.36 cases** per 100 thousand inhabitants.
- It is higher in Mexico City: 696.21
- In Quintana Roo, 357.52
- In Baja California Sur, 386.10
  - Los Cabos has an incidence rate of 279.74 cases per 100 thousand inhabitants.

SOURCE: SECRETARIAT OF HEALTH, GENERAL DIRECTORATE OF EPIDEMIOLOGY (www.coronavirus.gob.mx). FIGURES UPDATED AS OF JUNE 20th, 2020.

# Effects on employment in Mexico

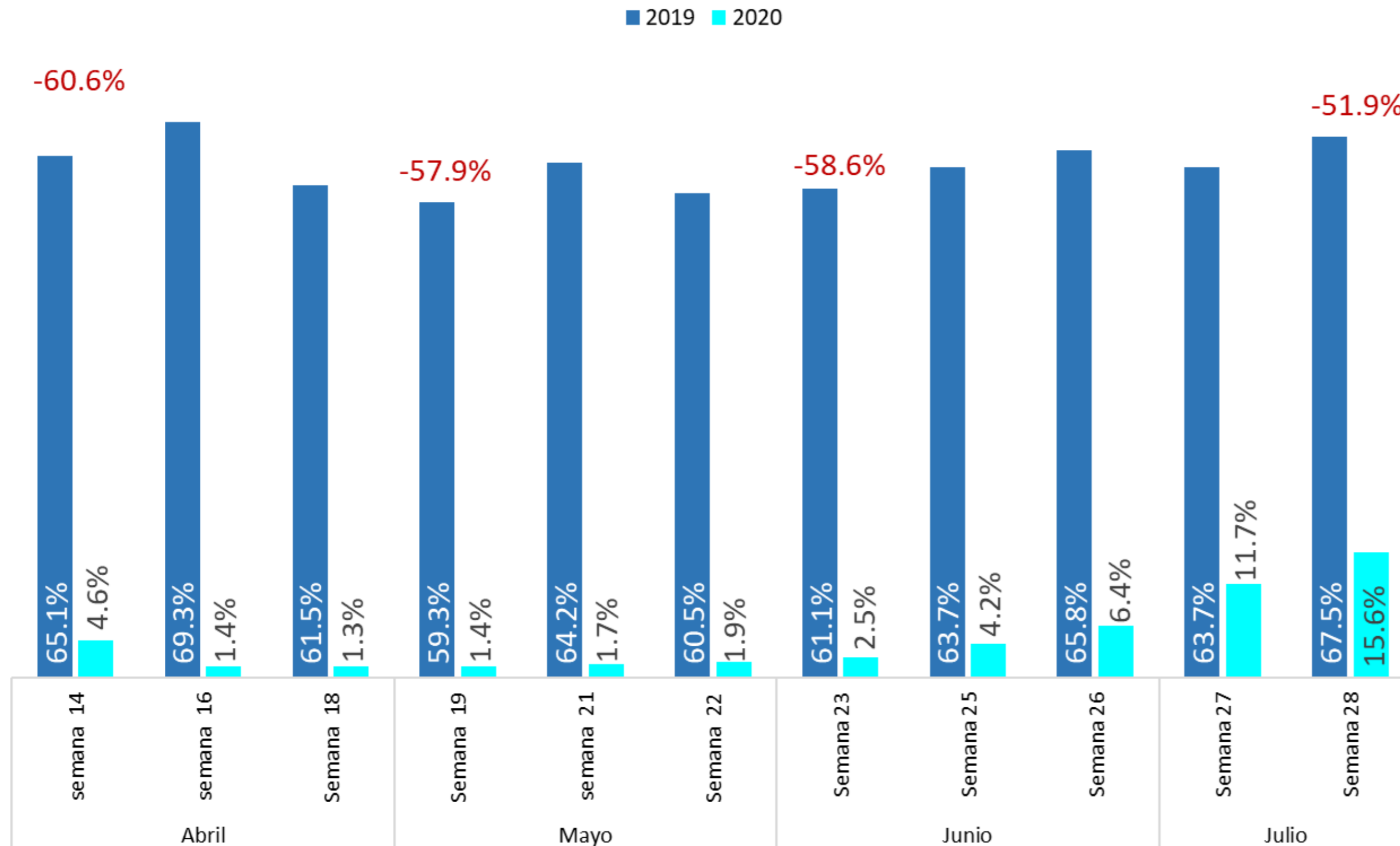


- As of June 30<sup>th</sup>, 2020, the country had a total of **19,499,859 jobs** registered in IMSS, where 86.6% are permanent, and 13.4% are temporary.
- As of Jun-2020, there was a decrease of **83,311** (-0.4%) jobs registered in IMSS with respect to those registered in May-2020.
- As of Jun-2020, there are 164,651 registered jobs in Baja California Sur; this is **-11.7%** vs. Jun-2019, but a slight increase of **+1.4%** vs. May-2020.
- In Quintana Roo's case, as for Jun-2020, there are 358,969 jobs; this is **-22.9%** vs. Jun-2019 and **+0.2%** vs. May-2020.

SOURCE: IMSS

# Hotel indicators in Mexico

Hotel occupancy percentage (average of 12 destinations in Mexico)



- As of the end of week 25 (June 21<sup>st</sup>), the occupancy percentage reached 4.2% (-59.5pp vs. the same month of 2019).
- From the second week of June onwards, there is an increase in the occupancy percentage as the transition to the new normality begins, and some destinations from Quintana Roo, Baja California Sur, and Nayarit start the gradual reopening of hotels and beaches.
- As of July 12<sup>th</sup> (week 28), the average hotel occupancy rate reached 15.6%.

SOURCE: DATATUR. MONITORED DESTINATIONS: VILLA HERMOSA, AGUASCALIENTES, TUXTLA GUTIERREZ, QUERETARO, PUEBLA, PUERTO VALLARTA, SAN CRISTOBAL DE LAS CASAS, LOS CABOS, CANCUN, MEXICO CITY, ACAPULCO AND SAN MIGUEL DE ALLENDE.

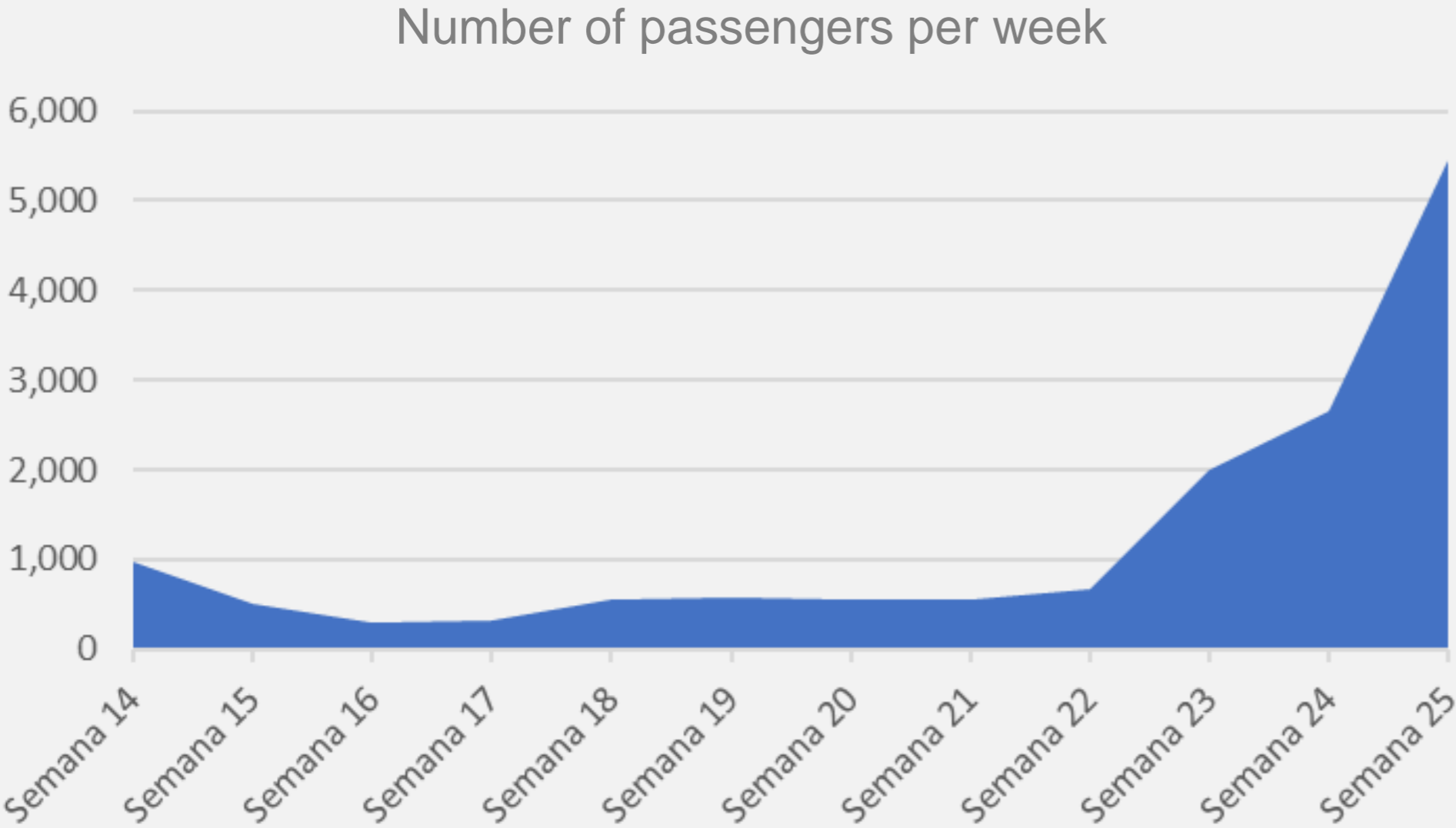


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**DEMAND INDICATORS**  
PASSENGERS AND TOURISTS

# Number of passengers arriving at Los Cabos International Airport per week, from week 14 to 25 of 2020

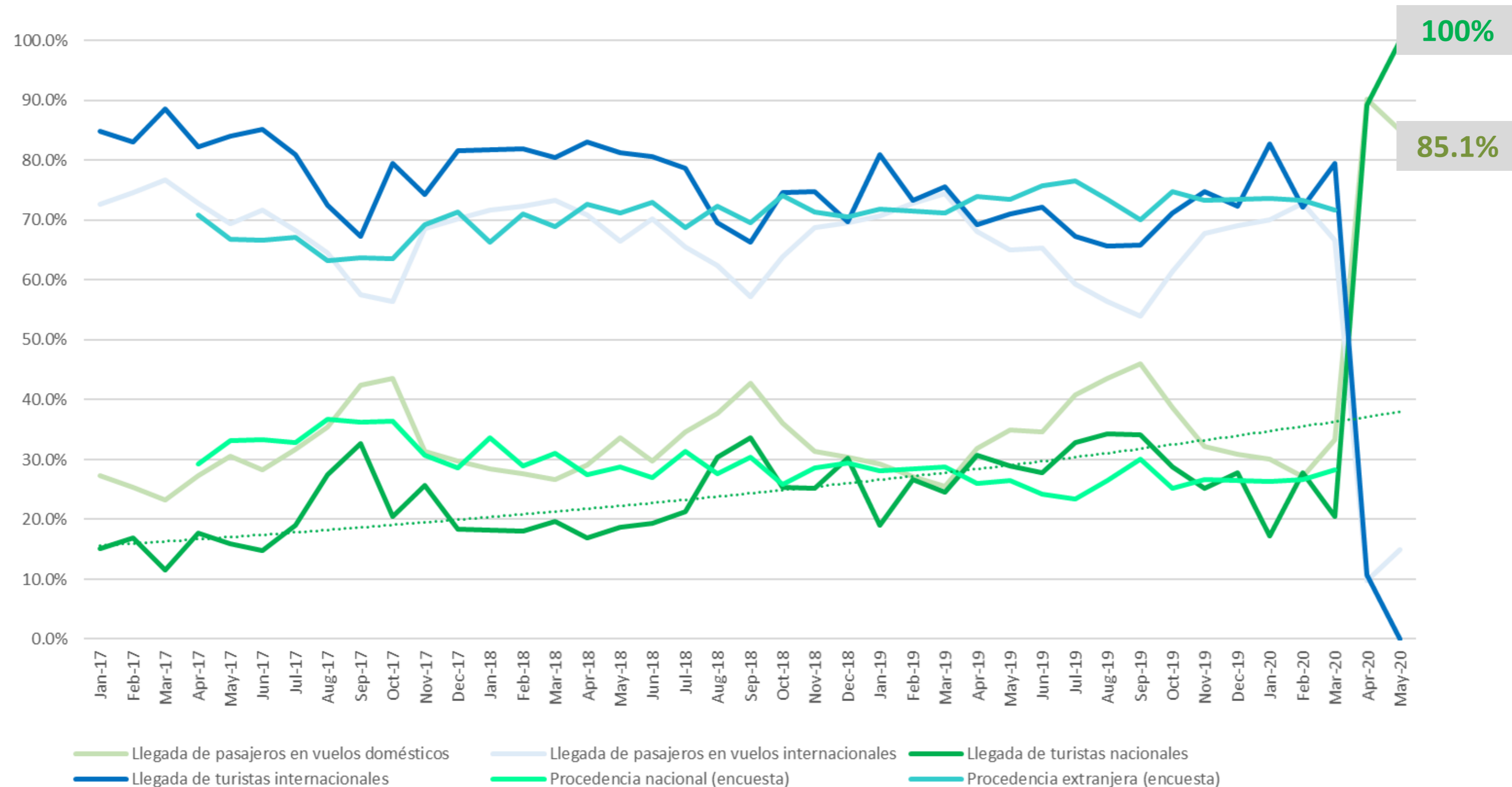


As of week 14 of the current year (April 1<sup>st</sup>), the destination closed its doors. As of week 23 (June), it has gradually increased the number of weekly passenger arrivals at Los Cabos International Airport to 5,450. Prior to the start of the pandemic, Los Cabos International Airport received an average of 80 thousand passengers per week.

SOURCE: PAXIS

# Evolution of national and international tourism participation

Participation percentage of both resident and non-resident tourist arrivals at hotels in Los Cabos, including passenger arrivals on domestic and international flights at Los Cabos International Airport (2017-2019)



- According to DataTur, the number of national residents arriving at hotels in Los Cabos reached 100% in May-2020 (it is recommended to take this information with reserve).
- Moreover, the participation of national passengers in the total registered by Los Cabos International Airport was 85.1%. This represents an increase of 50pp over the previous year.
- There is no data available from Tourist Surveys for May-2020.

SOURCE: DATATUR, GAP, TOURIST SURVEYS

# International tourist arrivals by air, by origin (residence), monthly 2019-2020

Regiones	May/2019	Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019	Nov/2019	Dec/2019	Jan/2020	Feb/2020	Mar/2020	Apr/2020	May/2020	Δ May-20 / May-19	Δ Ene-May-20 / Ene-May-19
EE.UU.	135,239	146,487	142,111	111,494	73,431	113,947	137,433	161,174	139,238	151,410	82,042	508	1,084	-99.2%	-46.9%
Canadá	6,852	4,225	4,373	4,425	3,261	7,350	19,046	21,542	22,830	23,837	9,003	13	15	-99.8%	-40.7%
Europa	1,011	782	897	756	303	447	1,230	1,210	1,434	1,235	557	10	12	-98.8%	-35.9%
Caribe, Centro y Sudamérica	232	134	239	200	124	102	152	148	210	175	83	3	-	-100.0%	-59.6%
Resto del Mundo	955	765	852	774	604	784	796	898	940	622	242	-	7	-99.3%	-63.0%
Gran total	144,289	152,393	148,472	117,649	77,723	122,630	158,657	184,972	164,652	177,279	91,927	534	1,118	-99.2%	-46.2%

Mercados clave	May/2019	Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019	Nov/2019	Dec/2019	Jan/2020	Feb/2020	Mar/2020	Apr/2020	May/2020	Δ May-20 / May-19	Δ Ene-May-20 / Ene-May-19
Reino Unido	131	94	184	219	73	155	827	773	942	692	357	2	5	-96.2%	61.9%
Australia	352	347	336	256	201	346	268	305	415	181	114	-	5	-98.6%	-57.4%
Corea del Sur	95	72	87	83	111	179	134	126	98	93	23	-	-	-100.0%	-63.9%
Total mercados clave	578	513	607	558	385	680	1,229	1,204	1,455	966	494	2	10	-98.3%	-16.5%

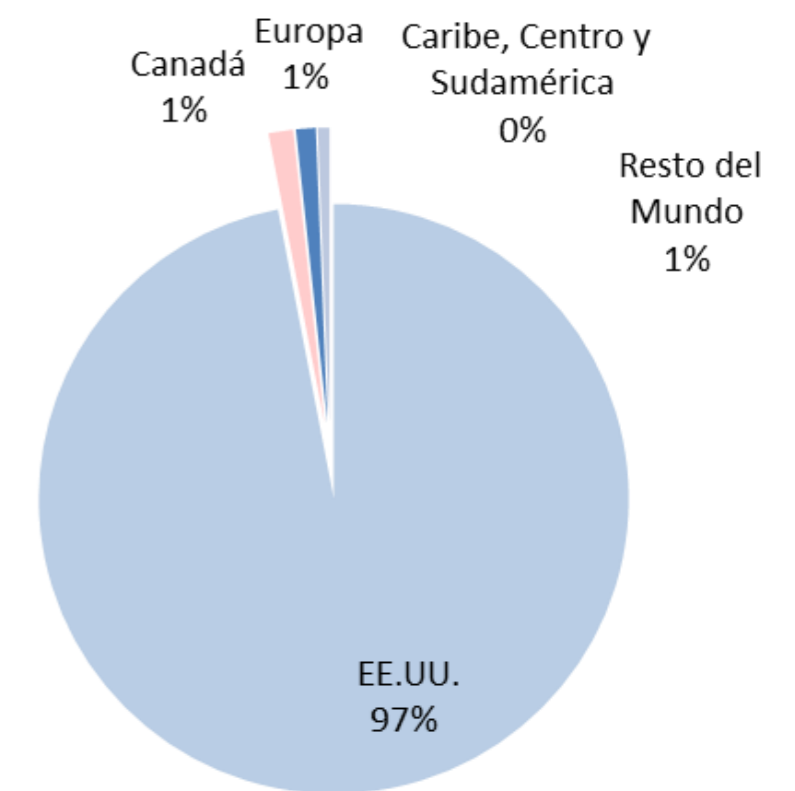
SOURCE: INM-SIOM

## International tourist arrivals by air, by origin (residence)

**-99.2% May-2020 vs. May-2019**

- The entry of 1,118 international tourists that arrived by air to the Los Cabos International Airport was registered in May-2020. This signified a decrease of 99.2% compared to May-2019.
- In May-2020, Americans represent 97% of the total.

Participation of international tourist arrivals  
by air to Los Cabos International Airport  
(May-2020)



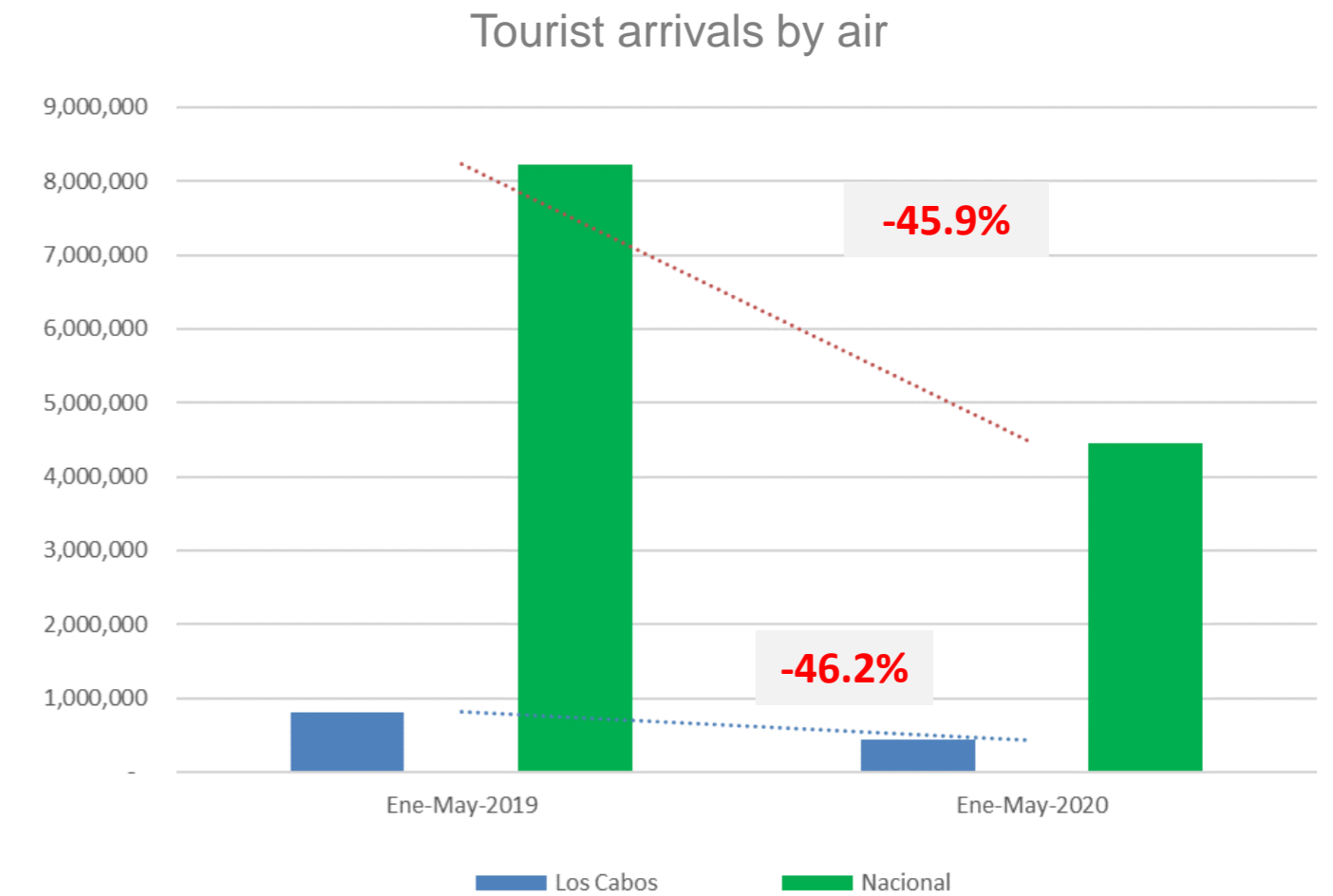
**Direct  
impact of  
COVID-19**

SOURCE: INM-SIOM

# International tourist arrivals by air, by origin (residence), accumulated 2018-2019

Regiones	Nacional			Los Cabos		
	Ene-May-2019	Ene-May-2020	Δ 2020/2019	Ene-May-2019	Ene-May-2020	Δ 2020/2019
Estados Unidos	4,631,185	2,470,701	-46.7%	704,456	374,282	-46.9%
Canadá	1,375,471	871,150	-36.7%	93,916	55,698	-40.7%
Europa	805,996	406,173	-49.6%	5,007	3,248	-35.1%
Caribe, Centro y Sudamérica	1,098,679	549,495	-50.0%	1,176	471	-59.9%
Resto del mundo	321,312	156,736	-51.2%	4,942	1,811	-63.4%
<b>Gran Total</b>	<b>8,232,643</b>	<b>4,454,255</b>	<b>-45.9%</b>	<b>809,497</b>	<b>435,510</b>	<b>-46.2%</b>

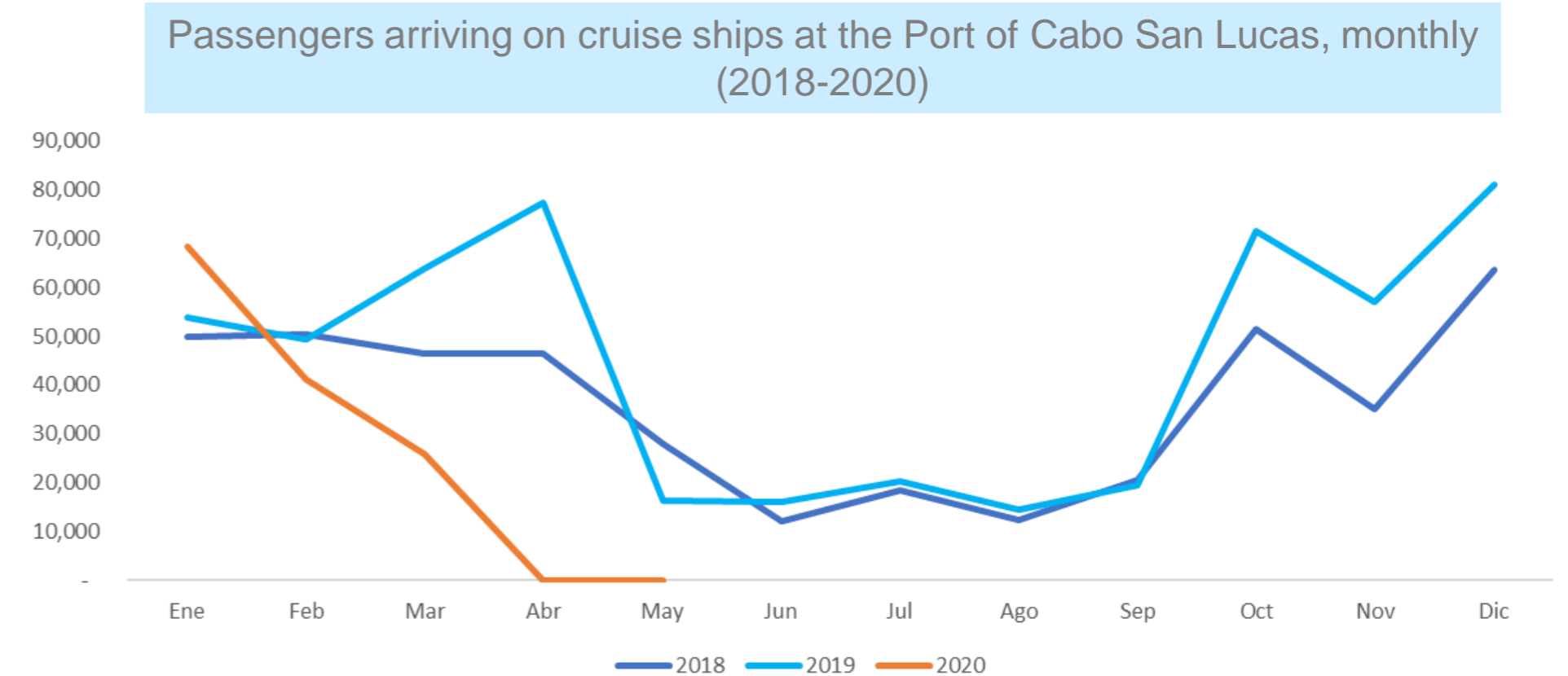
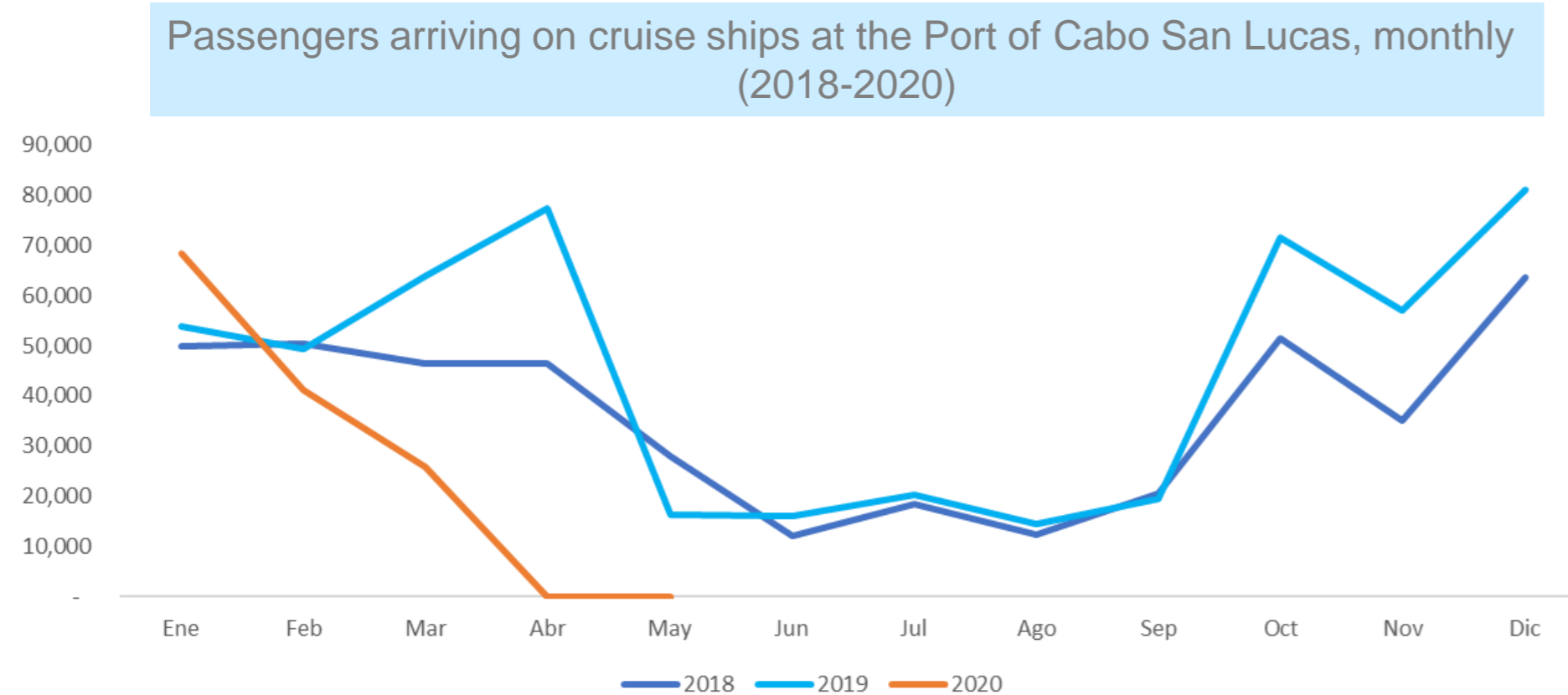
Mercados Clave	Nacional			Los Cabos		
	Ene-May-2019	Ene-May-2020	Δ 2020/2019	Ene-May-2019	Ene-May-2020	Δ 2020/2019
Reino Unido	209,783	79,399	-62.2%	593	214	-63.9%
Australia	28,748	13,381	-53.5%	1,683	715	-57.5%
Corea del Sur	39,248	20,622	-47.5%	593	214	-63.9%
<b>Total mercados clave</b>	<b>277,779</b>	<b>113,402</b>	<b>-59.2%</b>	<b>2,869</b>	<b>1,143</b>	<b>-60.2%</b>



SOURCE: INM-SIOM

# Passenger arrivals on cruise ships and vessels (2019-2020)

- There were no registered vessel or cruise ship arrivals at the Port of Cabo San Lucas in May-2020.



SOURCE: DATATUR - SCT



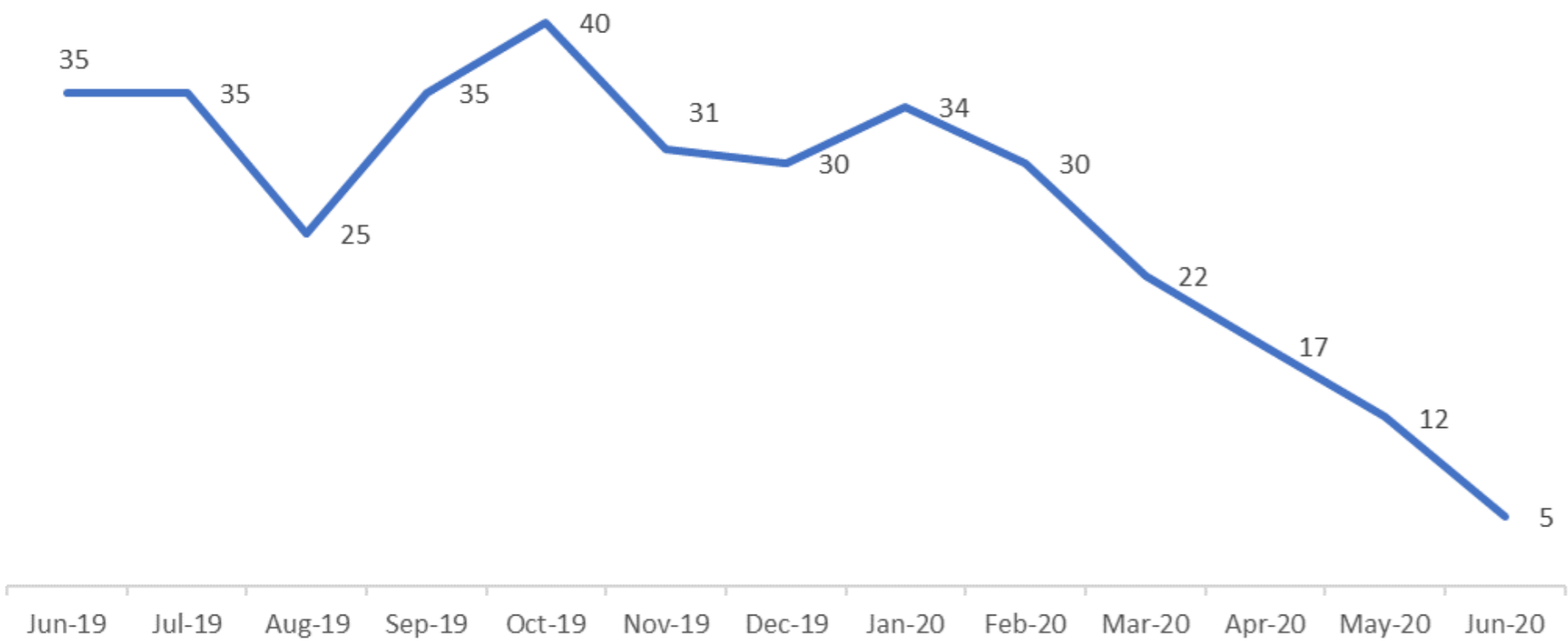
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**DEMAND INDICATORS**  
TOURIST SURVEYS & GROUP BUSINESS

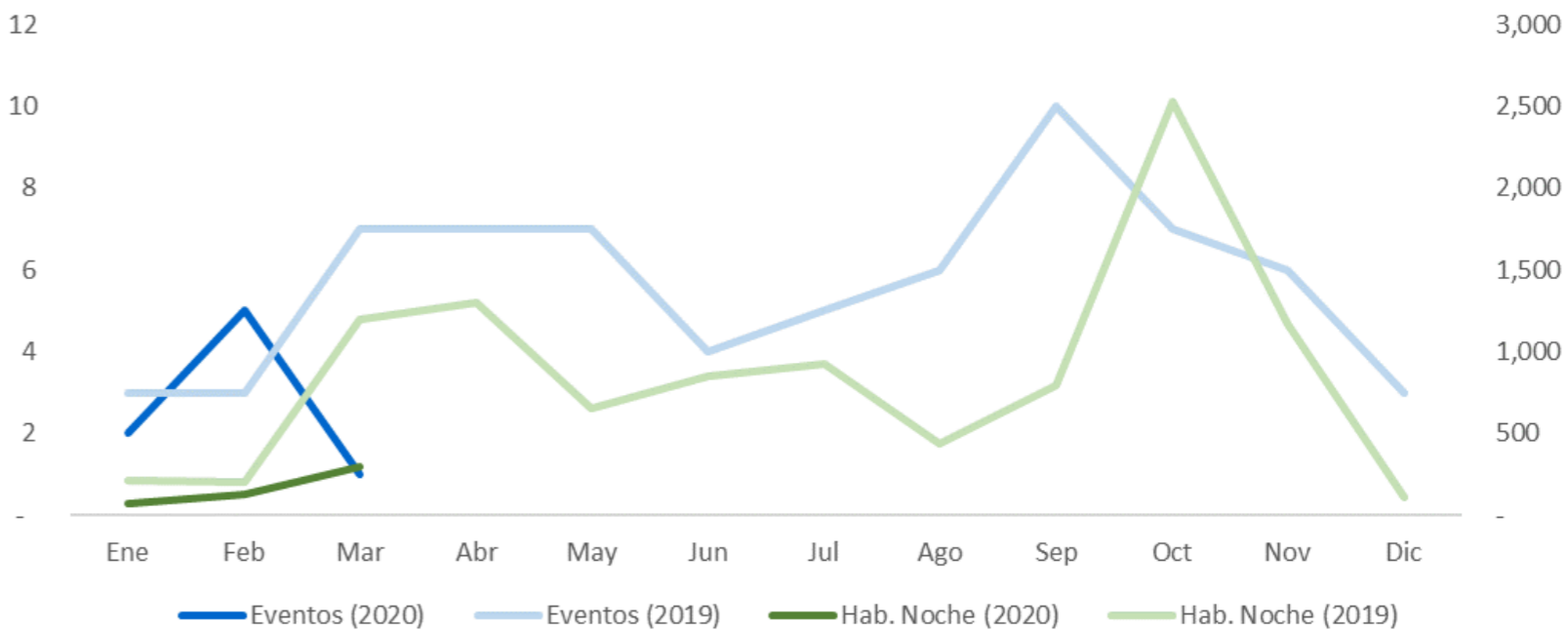
# Demand indicators: Group Business

RFPs received from meeting and group events, last 12 months (CVENT)



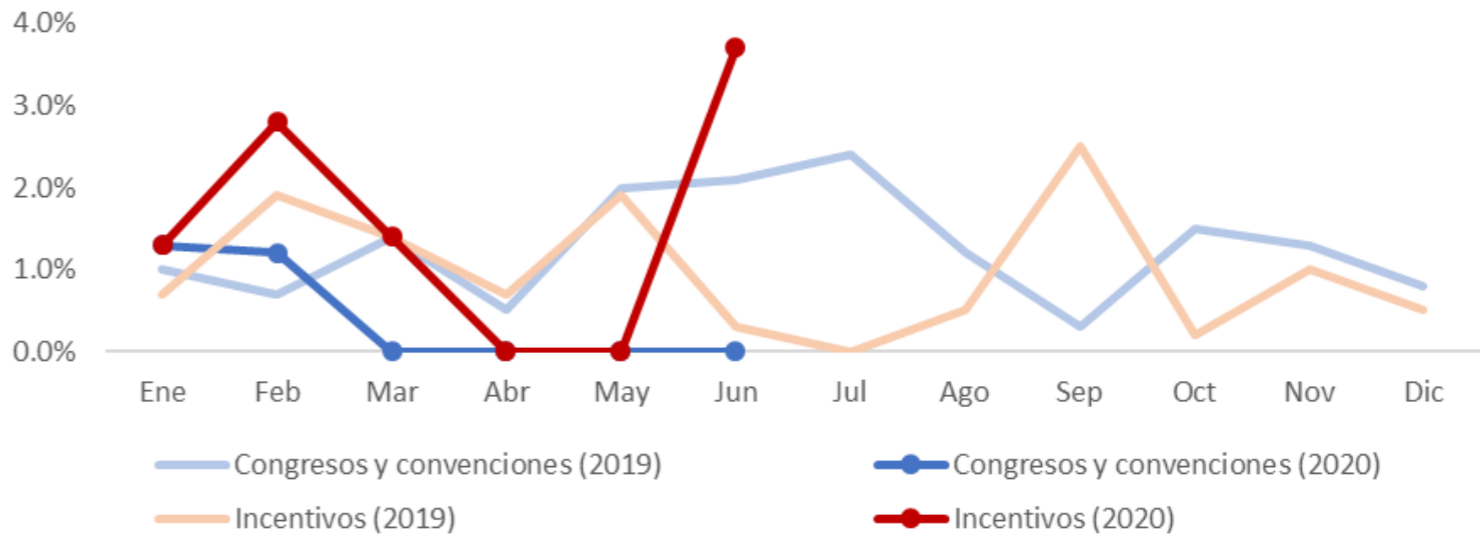
SOURCE: CVENT

Confirmed room nights and events, for meetings and groups (Helms Briscoe)




SOURCE: Helms Briscoe

Attendees to congresses, conventions and incentive trips (% of total tourists)



SOURCE: TOURIST SURVEYS

An aerial photograph of a coastal area with clear, turquoise water. In the lower-left quadrant, two small kayakers are visible on the water. A large, light-colored rock formation is situated in the center of the frame. The background shows a dense field of smaller rocks and coral reefs. The image is partially obscured by a large, white, curved shape on the right side, which serves as a background for the text.

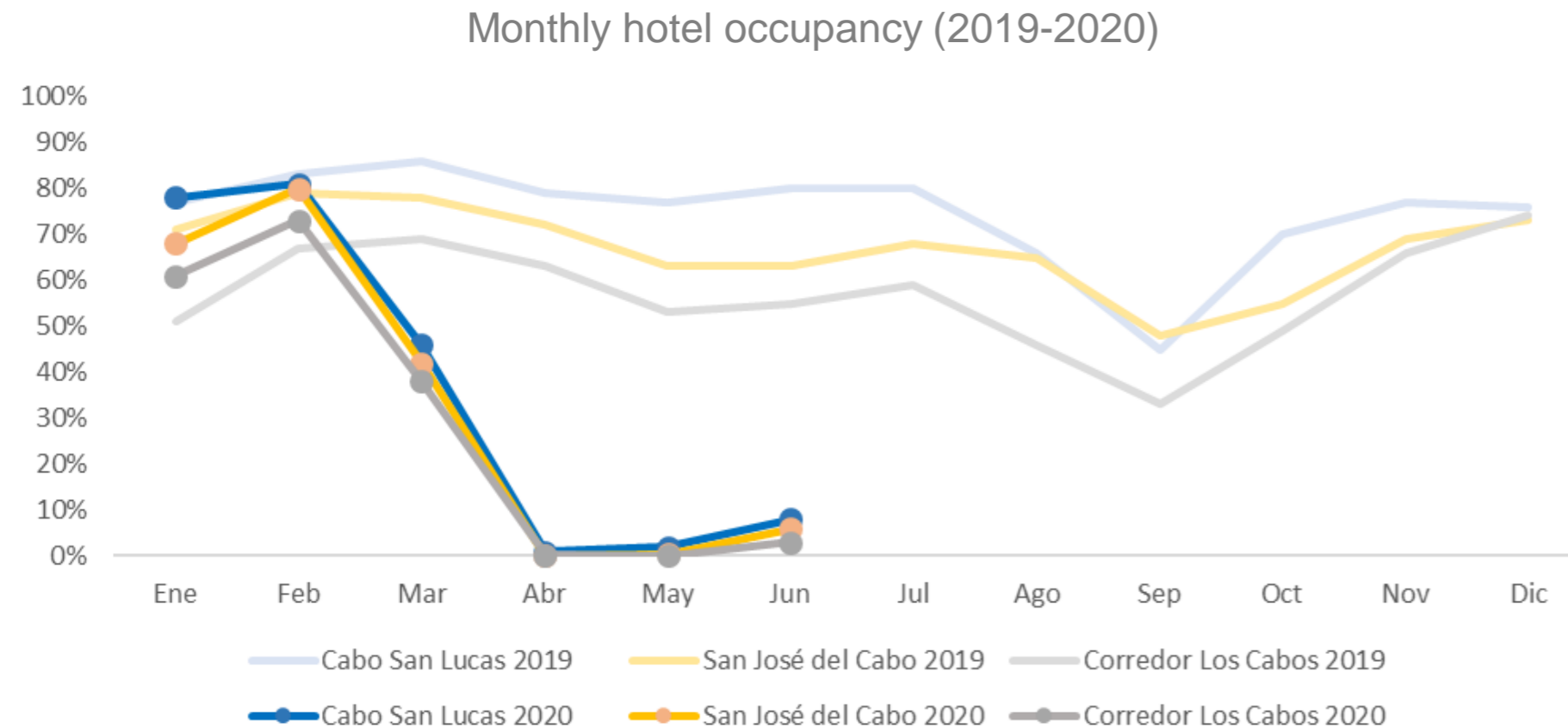
# LOS CABOS TOURISM OBSERVATORY

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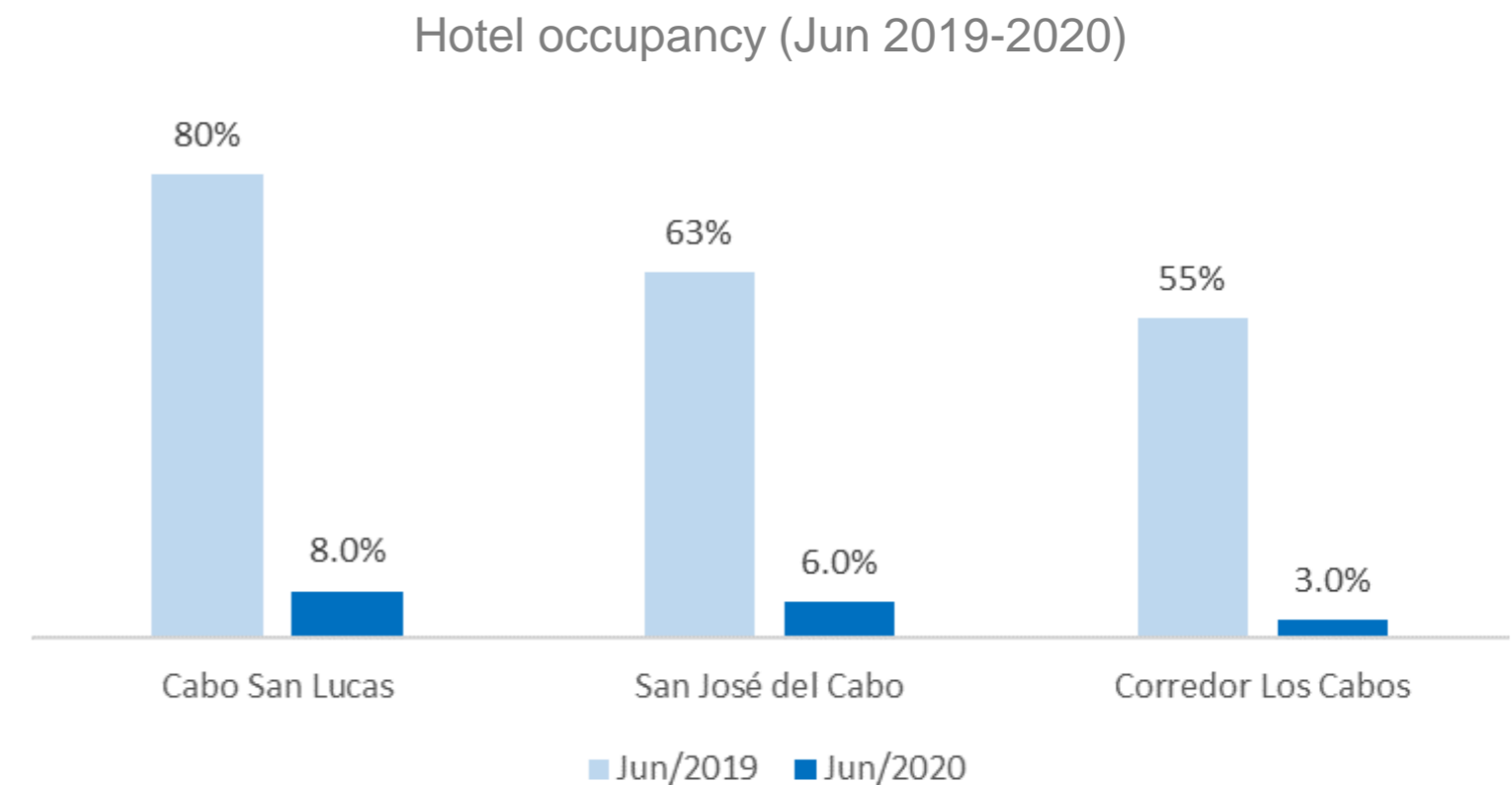
## SUPPLY INDICATORS

# HOTEL OFFER

## Evolution of the hotel offer in Los Cabos and sub-destinations



SOURCE: AHLC



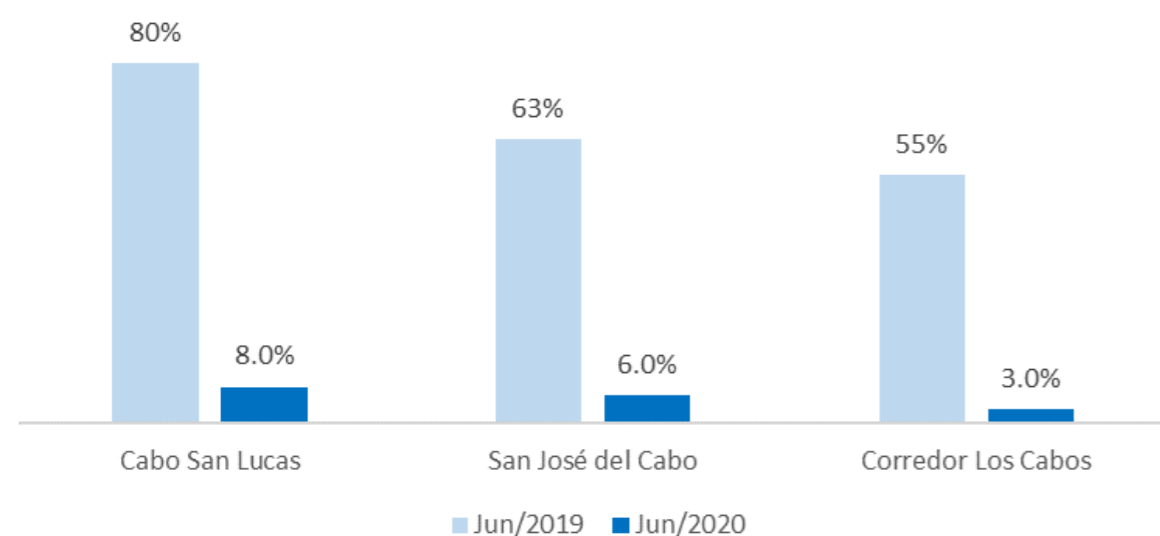
SOURCE: AHLC

- According to the Los Cabos Hotel Association, hotel occupancy in Los Cabos reached 7%, decreasing 63pp when comparing Jun-2019 with Jun-2020. On a sub-destination level, Cabo San Lucas had an occupancy of 8%, decreasing 72pp compared to the previous year. Meanwhile, San Jose del Cabo dropped 57pp, reaching 6%, and Los Cabos Corridor decreased 52pp, registering 3%.
- Los Cabos registered 565 tourists arriving at hotels in May-2020, 99.7% less compared with May-2019. The average stay decreased by 0.49 nights (from 4.89 in May-2019 to 4.4 in May-2020, according to DataTur).
  - International tourist arrivals at hotels fell 100% in this period, while national tourism did so by 99%.
  - In May-2020, national tourism represented 100% of the total. The previous year, the participation of 71.1% of international tourists was registered.

# HOTEL OFFER

## Evolution of the hotel offer in Los Cabos and sub-destinations

Hotel occupancy (Jun 2019-2020)

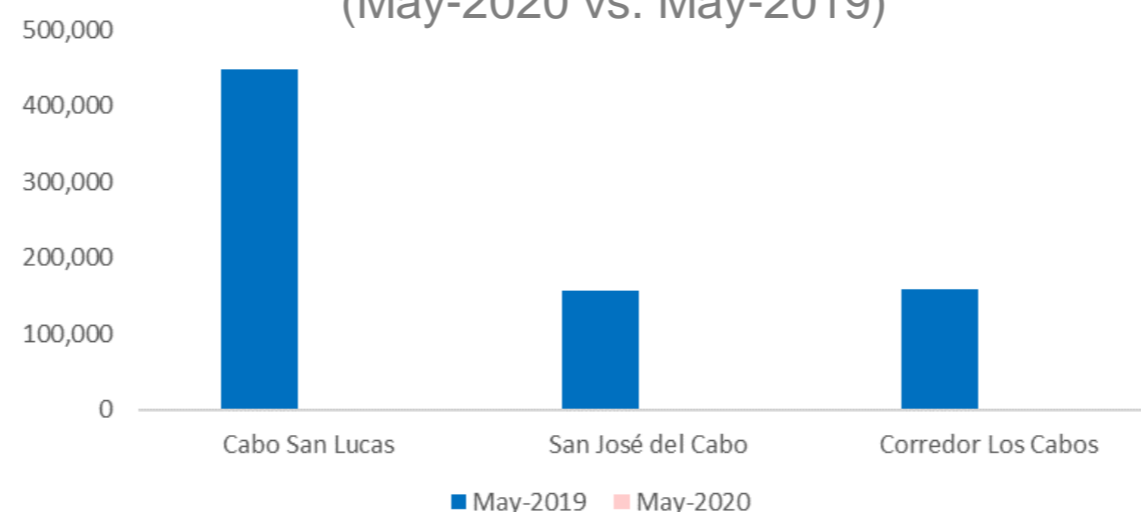


SOURCE: AHLC

### CABO SAN LUCAS

- The hotel occupancy registers 8%, which implies a decrease of 72pp (Jun-2019 vs. Jun-2020, AHLC).
- Its hotel offer increased by 8.4% from May-2019 to May-2020, going from 8.3 thousand to 9 thousand (DataTur).
- Occupied room nights dropped 99.6% between May-2019 and May-2020 (DataTur).

Room nights  
(May-2020 vs. May-2019)

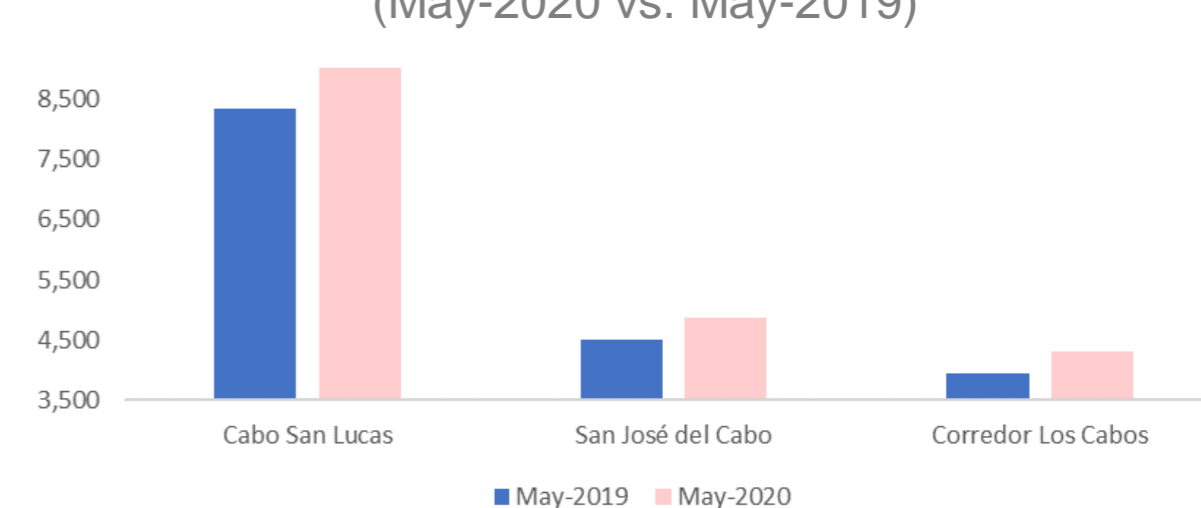


SOURCE: DATATUR

### SAN JOSE DEL CABO

- Occupancy dropped 576pp when comparing Jun-2019 to Jun-2020 (AHLC): 6%.
- Its hotel offer grew 8.4% between May-2019 and May-2020, registering 4.9 thousand rooms (DataTur).
- Occupied room nights dropped 100% between May-2019 and May-2020 (DataTur).

Rooms available  
(May-2020 vs. May-2019)



SOURCE: DATATUR

### LOS CABOS CORRIDOR

- Occupancy registers 3% in Jun-2020, which implies a decrease of 52 (AHLC).
- Its hotel offer grew 8.9% between May-2019 and May-2020, registering 4.3 thousand rooms (DataTur).
- Occupied room nights decreased 100% between May-2019 and May-2020 (DataTur).

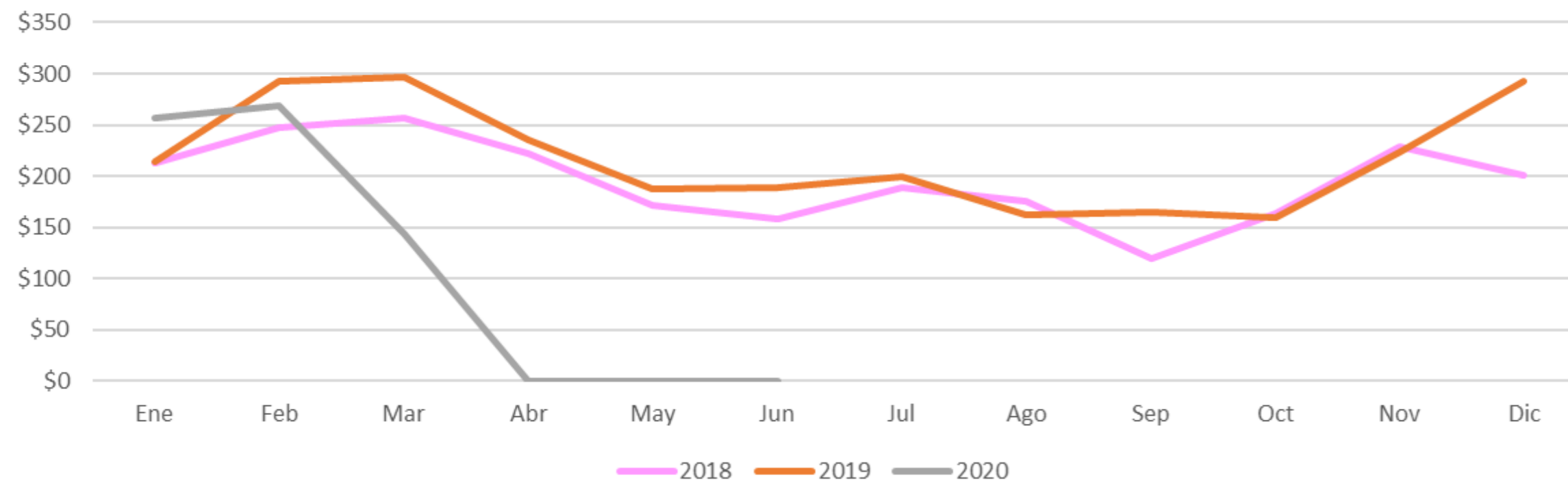
# HOTEL OFFER

## Evolution of the RevPAR and the average hotel rate in Los Cabos & sub-destinations

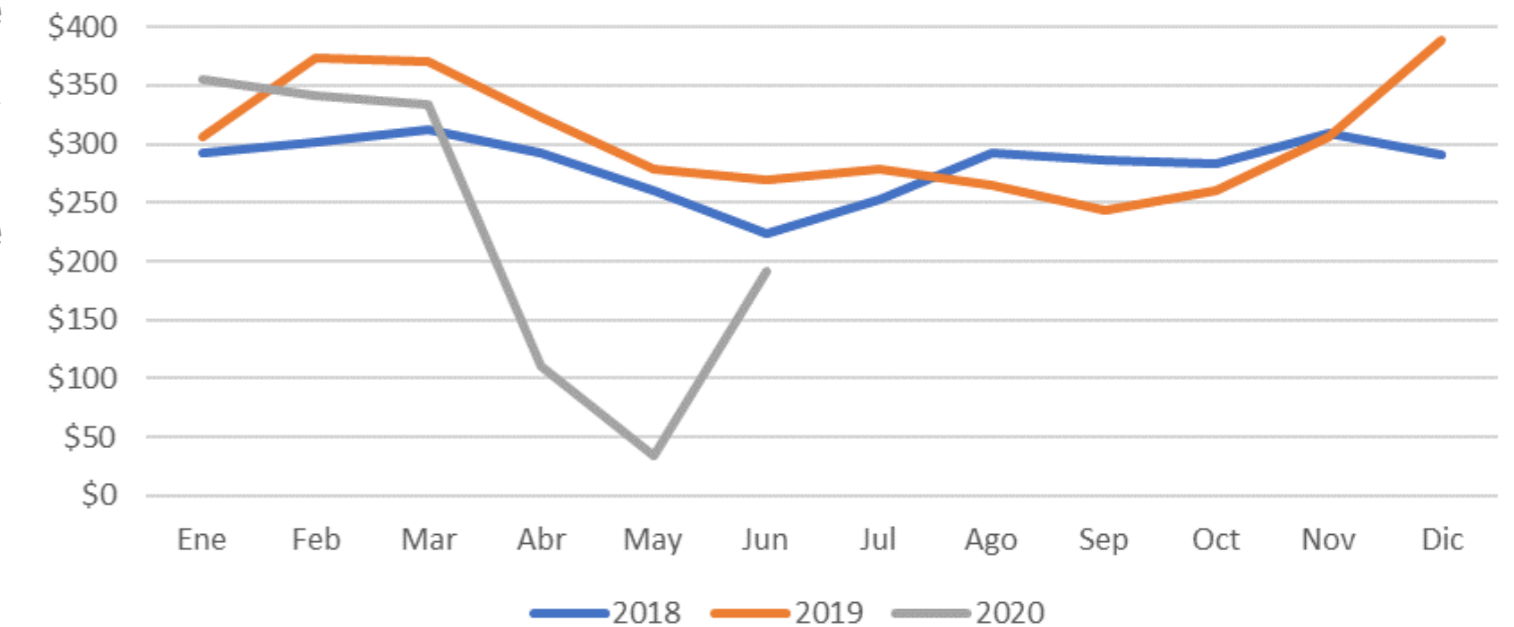
- The average hotel rate in Los Cabos for Jun-2019 was \$192 USD; \$67 below the average of the past 12 months, and \$78 less than that in Jun-2019. There is no available RevPAR data for Jun-2020.
  - Los Cabos Corridor registered the most significant decrease in its rate compared to the previous year: -70% settling at \$104.
  - San Jose del Cabo had the highest rate: \$153 USD (-31.4%).
  - Cabo San Lucas reduced its average rate by 59.4%, settling at \$98 USD.

RevPAR Los Cabos (USD, 2018 – 2020)

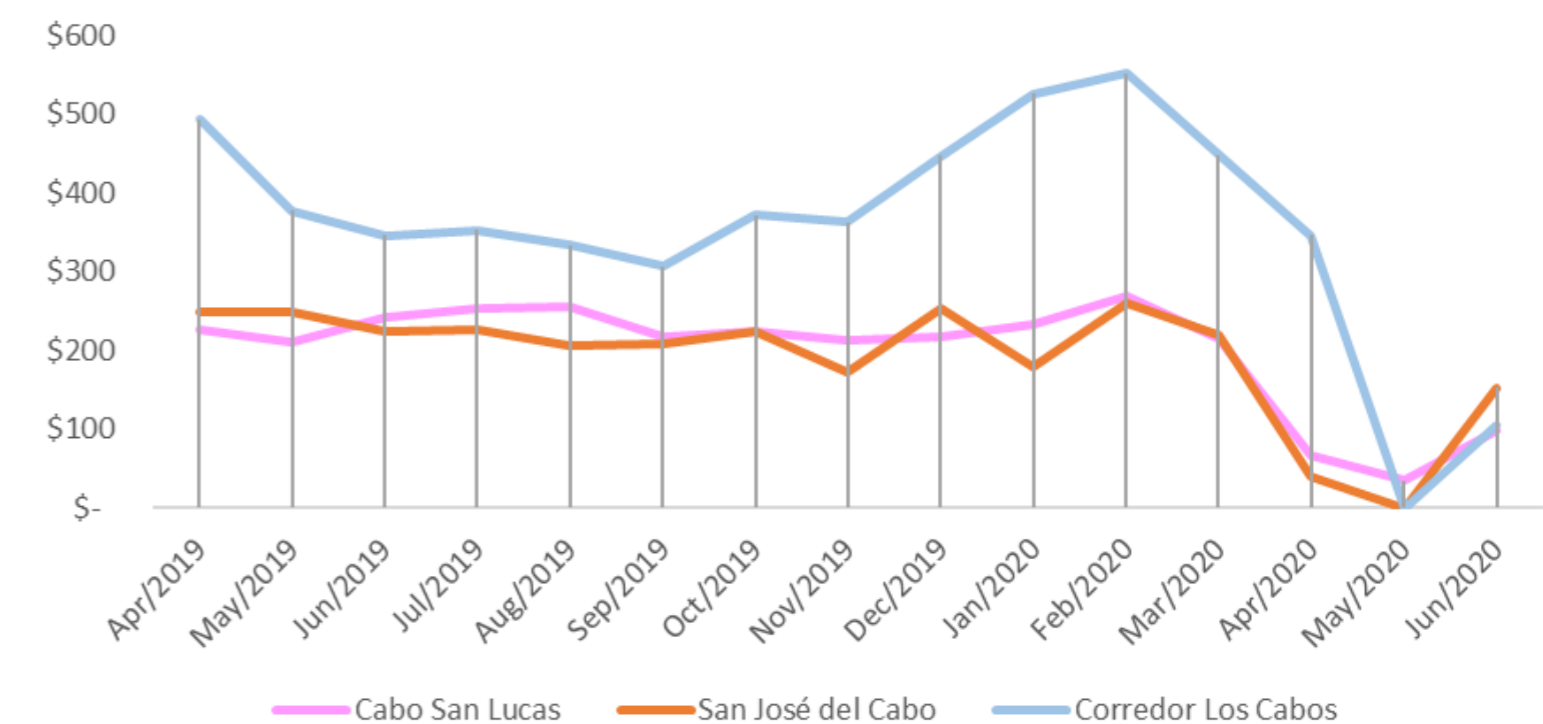
SOURCE: AHLIC



Average hotel rate, Los Cabos (USD, 2018 – 2020)



Average hotel rate, sub-destinations (USD, monthly, last 12 months)

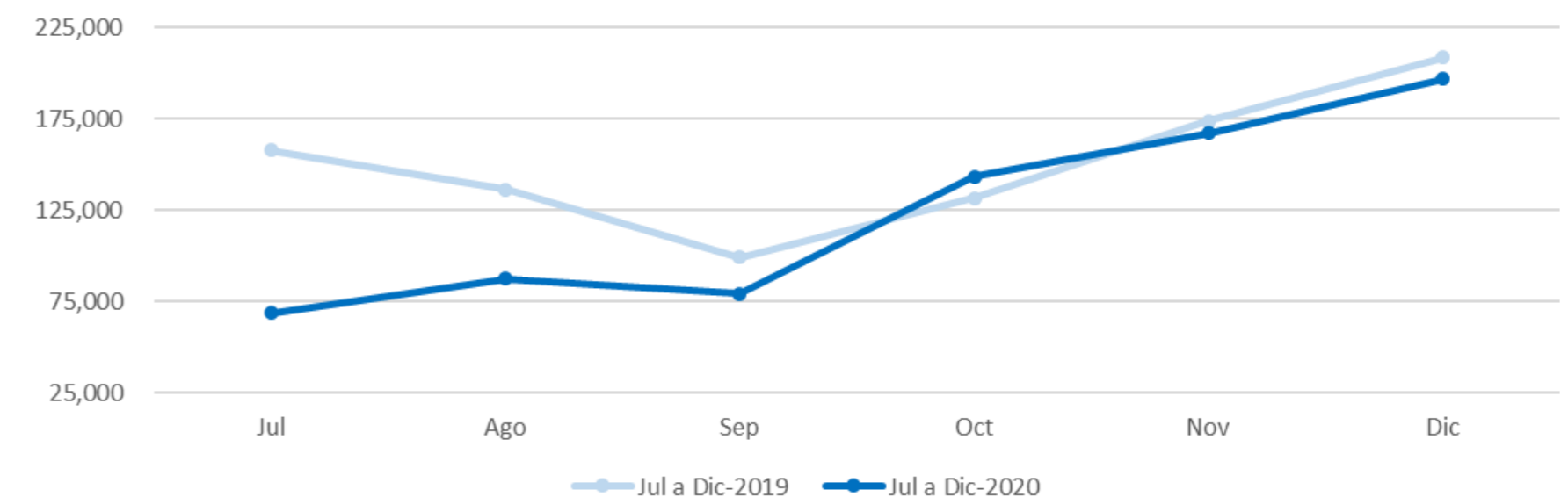


## SEATS SCHEDULED FOR JUL-DIC-2020

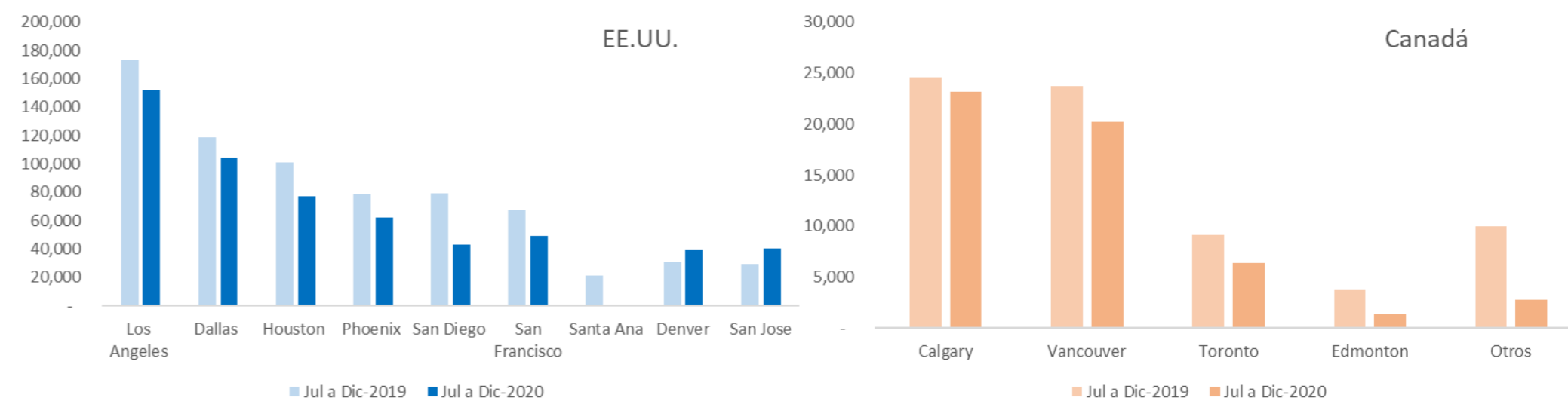
Seat offer report for the month in question and the 6 following months, as the case may be

- For the U.S., there are 55.2% fewer available scheduled seats for Jul-2020 compared to the same period last year, and for the next 6 months, there are 17.4% fewer scheduled seats compared to the same period in 2019.
  - Almost all origin airports have decrements, except for San Jose, CA (+35.9%) and Denver (27%). HOU (-24%) and San Diego (-46%) have the highest decrease. LAX and DFW have the lowest, with -12.2% and -12.3%, respectively.
- Los Angeles is the main issuing market in the U.S. (22%), followed by DFW and Houston (15% and 11%, respectively).
- American, Alaska, and United Airlines are the most relevant (70% as a whole).
- For Canada, there are 46.8% fewer available scheduled seats for Jul-2020, and for the next 6 months, there are 24.4% less.
  - Calgary dropped 5.9%, Vancouver 14.7%, and Toronto 30.3%. However, Calgary and Vancouver will gain 8pp and 5pp of participation, respectively.
  - Swoop will reduce the frequency of its flights by 100%, Sunwing will do so by 62.8%, and WestJet by 9.4%. AC will increase it by 29.1%.
- The international airlines' occupancy factors for Apr-2020 were: American 68%, Alaska 58%, Delta 66%, United 64%, and Southwest 60%. Air Canada fell to 0%, and there is no available data Sunwing's nor WestJet's occupancy this month.
  - Alaska registered the most significant decrease (-29pp). Delta registered the lowest decrease (-5pp).

Programación de asientos hacia San José del Cabo (Jul-Dic 2020)



Asientos programados por origen (Jul a Dic-2020)





# LOS CABOS TOURISM OBSERVATORY

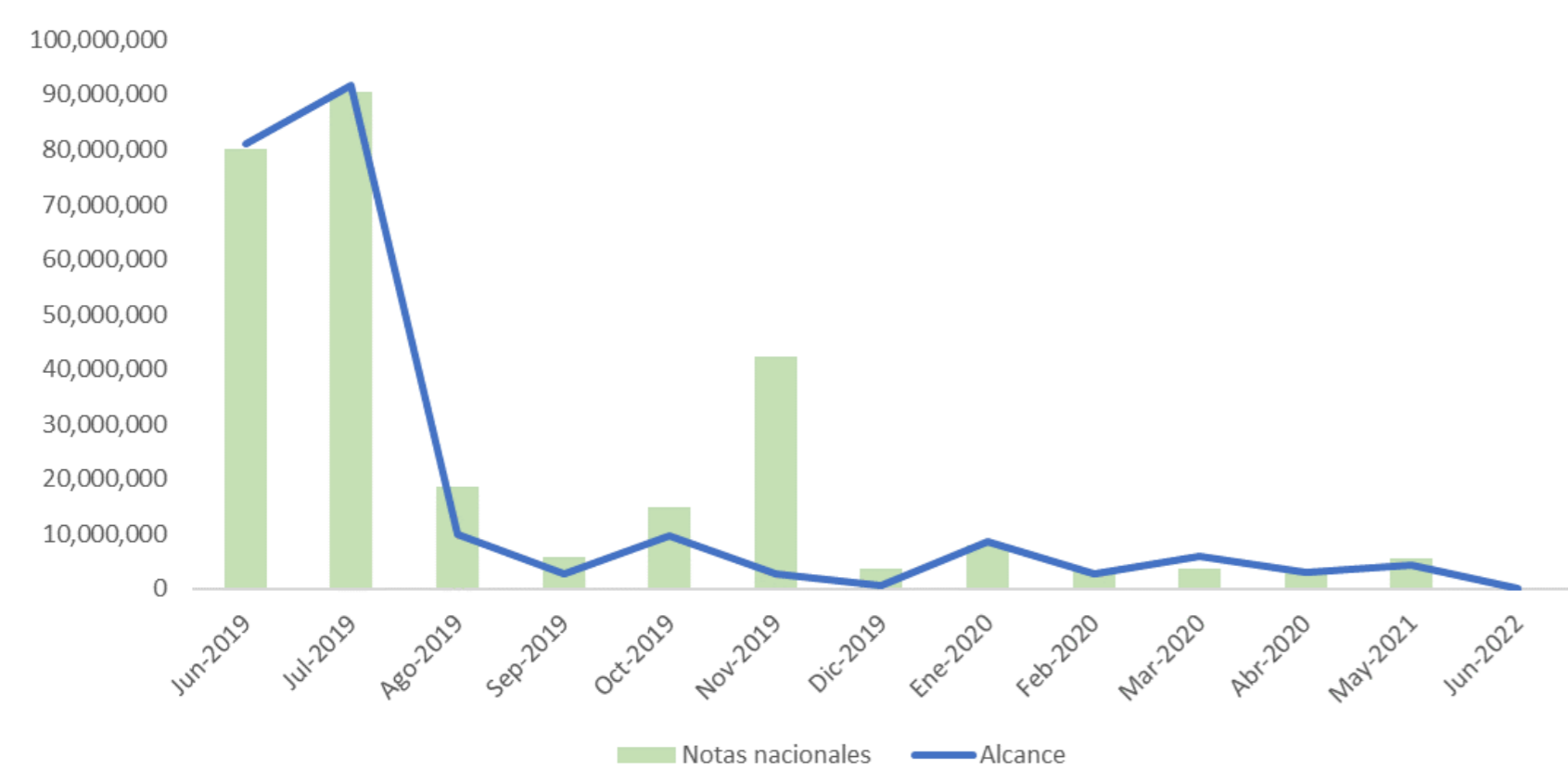
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## PUBLIC RELATIONS

# Public relations: notes and scope (last 12 months)

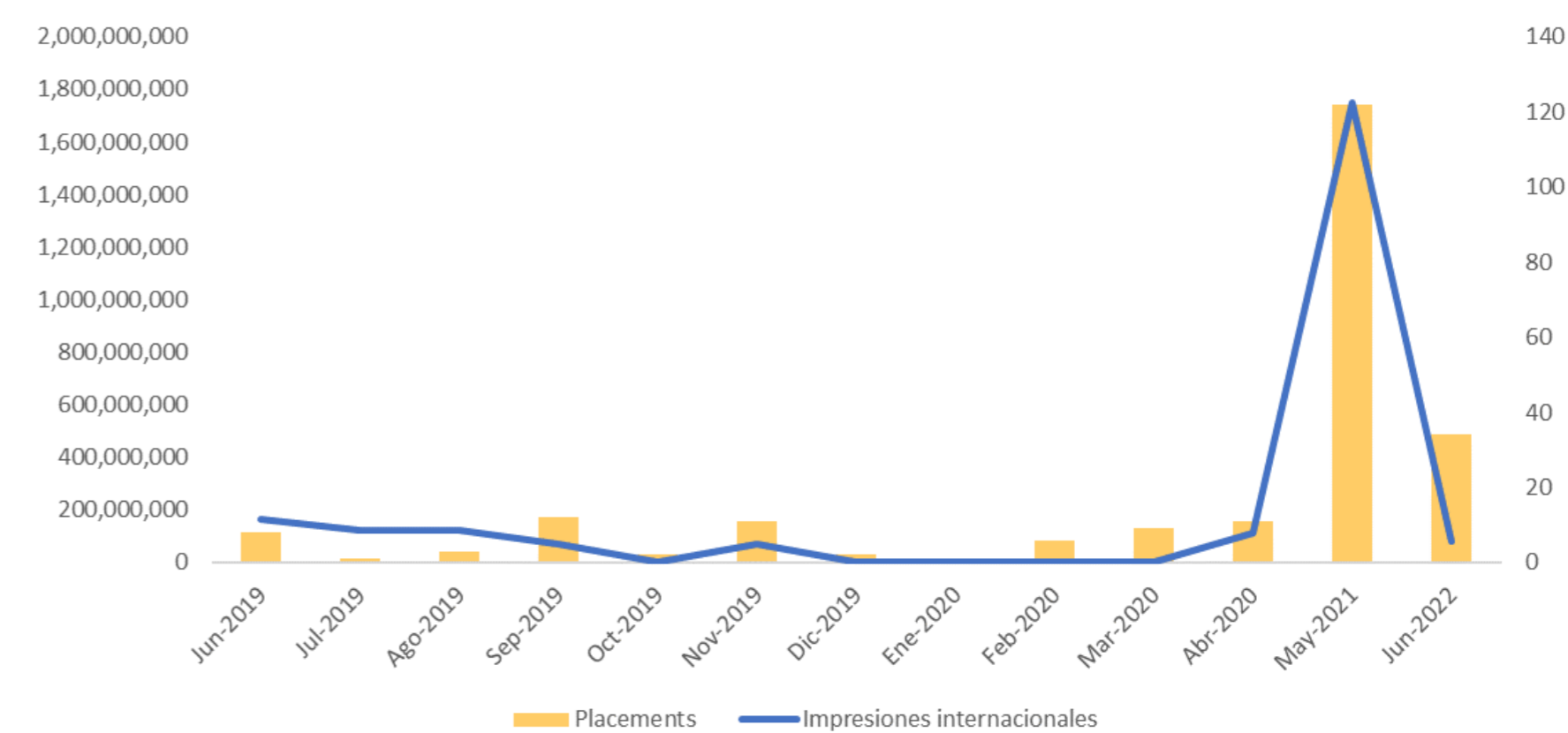
- **In the domestic market:**
  - In the period from Jul-2019 to Jun-2020 (last 12 months), there were 1,791 national press insertions (149 monthly on average), creating a scope of 142 million impacts (11.8 million monthly on average). 2 inserts were published throughout Jun-2020, achieving 14 thousand impacts.
- **In the international market:**
  - In the period from Jul-2019 to Jun-2020, there were 214 international press insertions (17.8 monthly on average), creating a scope of 2,333 million impacts (195 million monthly on average). 34 inserts were published throughout Jun-2020, achieving 80 million impacts.

NATIONAL NOTES' TOTAL & SCOPE (JUN-2020)



SOURCE: GAUDELLI (Feb-2018 to Jan-2019), LLORENTE & CUENCA (Feb-2019 to Jun-2020)

INTERNATIONAL NOTES' TOTAL & SCOPE (JUN-2020)



SOURCE: NJF (Feb-2018 to Jan-2019), OGILVY (Feb-2019 to Jun-2020)

# DEFINITIONS

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- **Congress.** Non-business-oriented meetings in which people gather in large groups, generally to discuss and exchange points of view on a topic of interest (including professional, cultural, sports, theological, social, governmental, academic, and more). These meetings often last several days and have simultaneous sessions, as well as a predefined multiannual or annual periodicity.
- **Convention.** Trade or business meetings usually sponsored by a corporation, where participants represent the company, corporate group, or customer-supplier relationships. Their participation could be mandatory, so travel expenses are borne by the corporation. This category includes general and formal legislative, social or economic meetings, to provide information, deliberate, establish consensus or deal with participants' policies, as well as address a market's, product's or brand's commercial issues. It may include a secondary presentation element.
- **Available rooms.** The number of rooms in service. It doesn't account for out of service rooms due to repair or some other cause.
- **Tourist destination.** The main target of a tourist's trip. The visiting place is fundamental for the decision-making process to plan a trip. The main reason for the trip.
- **Seasonality.** It means that tourist flows tend to be distinct across different seasons (around certain times of the year), repeating this process annually.
- **Length of stay.** It results from dividing the total number of room nights by the number of bookings per month. The obtained result expresses the number of days a tourist stays.
- **Events or incentive trips.** Incentive travel is a new strategy that recognizes people who have reached or exceeded goals generally related to sales or productivity. It is addressed to participants who have better job performance, gifting them with a remarkable travel experience.
- **Room nights.** Obtained from the daily number of rooms occupied by tourists, times their length of stay (number of nights that they spend in the establishment). Classified according to the place of origin, and residency or non-residency status.
- **Inflation.** General and continuous rise in the prices of goods and services marketed in an economy. It is the average growth rate of the goods and services' prices between one period and the next.
- **Underlying inflation.** The prices' increase in a subset of the INPC (National Consumer Price Index), which includes generics with less volatile prices. It measures the inflation trend in the medium term. The 283 generic concepts that make up the goods and services basket of the INPC are classified into subsets that respond to particular needs of analysis. Among the most well-known classification, there is the object of expenditure, which refers to the origin of goods and services' sector; and the durability of goods and the underlying inflation.
- **Passenger arrivals.** Passengers carried on scheduled services by airlines.
- **Tourist arrivals.** Corresponds to the number of tourists that visited the establishment throughout the month.

# DEFINITIONS

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- **Visitor's nationality.** Granted by the country that issues the passport or other identity documents, even when residing in another country.
- **Non-resident.** The person whose habitual environment is outside the Mexican territory and visits the latter for less than 12 months for any reason (including business, vacation, and more), excluding those who get paid for working in activities at the visiting place.
- **Hotel occupancy.** The accommodation occupancy rate is a supply-based concept. It is an important indicator that provides information on the use of different accommodation types and, if the data is obtained monthly, it also indicates the seasonal pattern use of tourist accommodations.
- **RevPAR.** RevPAR is the most important metric used in the hotel industry to assess the financial performance of an establishment or a chain (it assesses a property's ability to fill its available rooms at an average rate). RevPAR is short for Revenue Per Available Room (income per available room). It refers to a specific period (weekly, monthly, annual, etc.). One way to calculate RevPAR is through the formula:  $\text{RevPAR} = \text{It} / \Sigma \text{Ht}$ , where It equals the total room revenue and  $\Sigma \text{Ht}$  equals the number of rooms available during a period (the multiplication of total establishment's rooms by the room nights in that period, minus the number of rooms that are not available).
- **Resident.** Individual who lives permanently or on a long-term basis in the territory of the United Mexican States.
- **Residence.** The place/country where the traveler has stayed most of the past year (12 months), or has stayed for a shorter period and plans to return within 12 months to live in that country.
- **Average daily rate.** Commonly known as ADR. It is a statistical unit that represents the average rental income per paid occupied room in a given period. Along with the occupation of the property, both are the basis of the property's financial performance. ADR is calculated dividing room revenue by the number of rooms sold. Houseguest rooms (also known as "house use") and free rooms (known as "complementary rooms") should be excluded from the denominator.
- **Tourist.** Any individual who travels outside their usual environment for less than 12 months for any reason, except those who engage in activities that will generate income at the travel destination: refugees or migrant workers, diplomats, seasonal workers, or travel employees.
- **Visitor.** Any individual who travels outside their usual environment for less than 12 months for leisure, business, religious, medical, or other reasons. Exceptions include people who engage in activities that will generate income at the travel destination: refugees or migrant workers, diplomats, seasonal workers, tourism employees, or people looking for a new residence or job.

## LOS CABOS TOURISM OBSERVATORY

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