



# LOS CABOS TOURISM OBSERVATORY

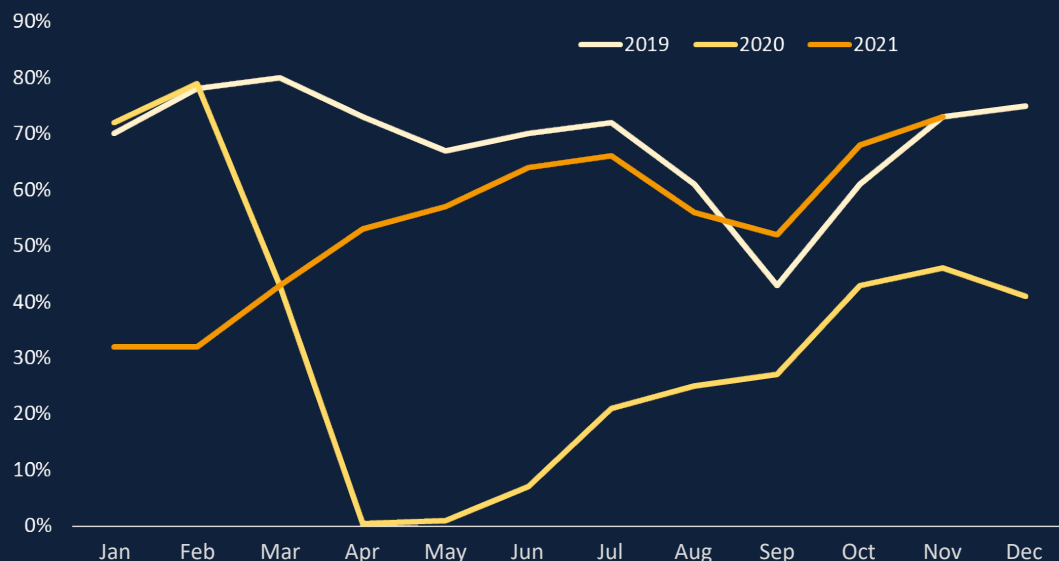
**KEY PERFORMANCE INDICATORS**

DECEMBER 2021



# Leading indicators - Summary

## Hotel Occupancy:



**Hotel Occupancy (Nov-2021):**  
**73%**  
**+0pp**  
 (vs. Nov-2019)

SOURCE: AHLIC



**Rooms Available (Oct-2021):**  
**22,487**  
**+1.8%**  
 (vs. Oct-2019)

SOURCE: DATATUR

## Hotel Performance

**Room Nights (Oct-2021):**  
**1,127,827**  
**+17.7%**  
 (vs. Oct-2019)

SOURCE: DATATUR

## Air Passenger Arrivals

**Total Passengers (Nov-2021, expressed in thousands):**  
**274.8**  
**+16.1%**  
 (vs. Nov-2019)

**National Passengers (Nov-2021, expressed in thousands):**  
**94**  
**+23.6%**  
 (vs. Nov-2019)

**International Passengers (Nov-2021, expressed in thousands):**  
**180.8**  
**+12.6%**  
 (vs. Nov-2019)

SOURCE: GAP

## Other indicators

**Cruise Ships (Oct-2021):**  
**18**  
**-13 vessels**  
 (vs. Oct-2019)

SOURCE: DATATUR

**Cruise Passengers (Oct-2021):**  
**26,283**  
**-63.3%**  
 (vs. Oct-2019)

SOURCE: DATATUR

**Tourist Satisfaction: more than expected (Nov-2021):**  
**64%**  
**+29.6pp**  
 (vs. Nov-2019)

SOURCE: TOURIST SURVEYS

**Attendees to Congresses and Conventions (Nov-2021):**  
**1.2%**  
**-0.1pp**  
 (vs. Nov-2019)

SOURCE: TOURIST SURVEYS

**Group Business Total RFPs (Nov-2021):**  
**29**  
**-2 RFPs**  
 (vs. Nov-2019)

SOURCE: CVENT

**Tourists' Origin (Nov-2021):**  
**67.2%**  
**foreigners**  
**-6.1pp**  
 (vs. Nov-2019)

SOURCE: TOURIST SURVEYS



# Leading indicators - Summary

## PASSENGER ARRIVALS

- In Nov-2021, Los Cabos International Airport recorded a 16.1% (+38.2 thousand) increase in the total number of passengers arriving at the destination compared to Nov-2019, adding up to a total of 274.8 thousand (when considering arrivals only).
  - Passengers on domestic flights (94 thousand) represent 34.2% of total arrivals. These increased by 23.6% (+17.9 thousand vs. Nov-2019).
  - Passengers on international flights (180.8 thousand) represent 65.8% of total arrivals. These increased by 12.6% (+20.25 thousand vs. Nov-2019).

## FLIGHT SCHEDULES

- The domestic market has 32.9% more available seats scheduled from Dec-2021 to May-2022 (compared to the same period in 2019). 32% more seats are expected in Dec-2021.
  - Flight seats departing from CDMX, MTY, and TIJ increased by 33%, 54.4%, and 100.6%, respectively (compared to 2019); however, BJX decreased by 39.1%.
- There are 1.38 million seats scheduled for the U.S. in the next six months, which is 30.1% more than the same period in 2019.
  - LAX (+57%), PHX (+43%), HOU (+14.1%), DFW (+24.3%), DEN (+46.6%), and SEA (+25.7%) had the most significant increase vs. 2019. However, San Diego showed a decrease of 33.1%.

- For Dec-2021, the United States expects 37% more available seats than those scheduled for 2019.
- From Canada, 33.8% fewer seats are expected in the next six months, with a 46% drop in Dec-2021.
  - Decreases are expected in Calgary (-42.8%) and Toronto (-26%) within the next six months. Vancouver showed an increase of 24.6% compared with 2019.

## HOTEL PERFORMANCE

- Occupancy in Nov-2021 was 73%, remaining the same as in Nov-2019.
  - Occupancy in Cabo San Lucas decreased by 2pp compared to Nov-2019 and is now at 75%.
  - San Jose del Cabo recorded an occupancy rate of 68% (1pp lower than in Nov-2019).
  - Los Cabos Corridor recorded an occupancy rate of 70% (a 4pp increase compared to Nov-2019).
- The number of rooms available in Los Cabos increased 1.8% between Oct-2021 and Oct-2019, reaching 22,487 this month.

- Hotels in Los Cabos recorded 239 thousand tourist arrivals, equivalent to an increase of 23.5% between Oct-2021 and Oct-2019.
- Domestic tourism dropped by 1.7% (-930), while international tourism increased by 33.8% (+46.4 thousand).
- There were 1.13 million occupied room nights in Oct-2021, 17.7% more compared to Oct-2019.

## TOURIST SURVEYS

- In Nov-2021, 64% of tourists rated their experience in Los Cabos as better than expected (29.6pp more than in Nov-2019, but 1pp lower than in Oct-2021).
- During Nov-2021, security was perceived as bad or regular by 3% of tourists, 12pp better than in Nov-2019.
- Satisfaction with the airport also improved 5.4pp compared to 2019 (5.6% of tourists perceived their experience as bad or regular); however, it is 4.8pp lower compared to Oct-2021.
- The number of repeat tourists decreased by 8.5pp compared to 2019, reaching 39% in Nov-2021.
- 21% of tourists traveled with a package tour, down 19pp compared to 2019.
- The number of tourists who visited restaurants increased by 16pp this month, recording 81%.

LOS  CABOS

LOS CABOS TOURISM  
OBSERVATORY

PASSENGER ARRIVALS

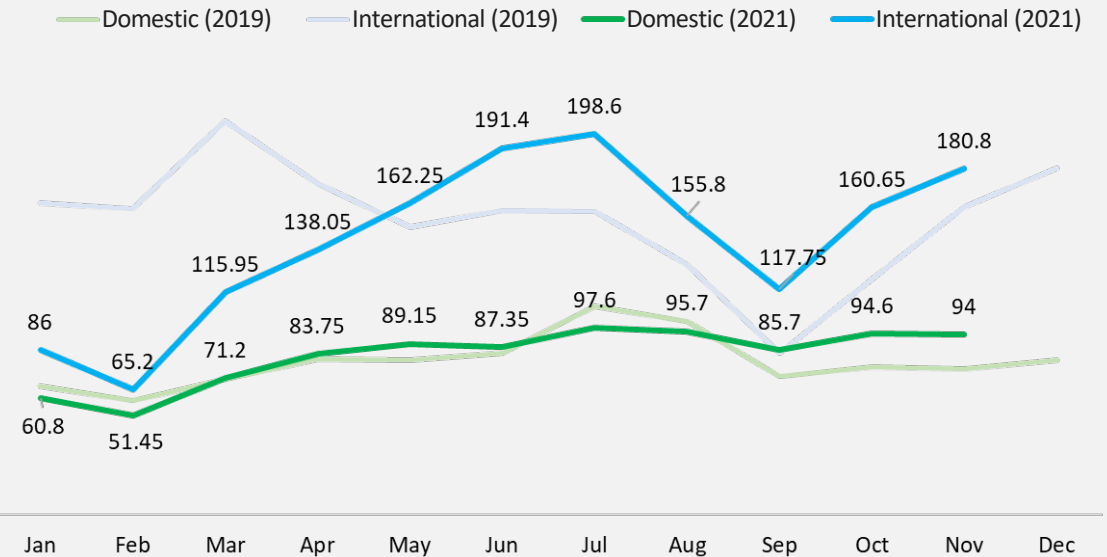


# Passenger arrivals at Los Cabos International Airport, 2019-2020

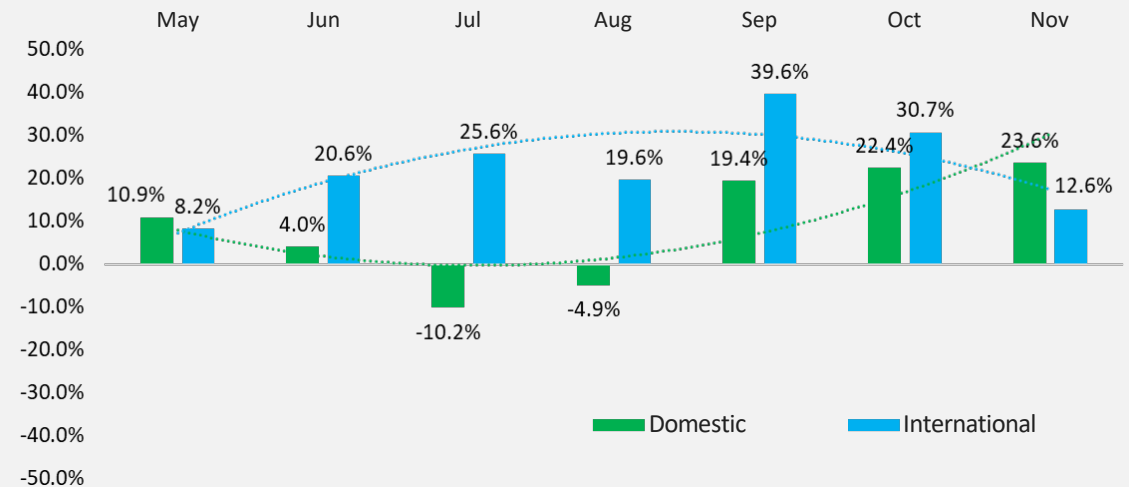
- In Nov-2021, 274.8 thousand passengers arrived at Los Cabos International Airport, which represents a 16.1% **increase** compared to the same period in 2019.
- It also represents an average growth rate of 3.8% between Nov-2020 and Nov-2021.
- Passengers on domestic flights (**94 thousand**) represent 34.2% of total arrivals and increased by 23.6% compared to Nov-2019.
  - TMAC: 2.1% (between Nov-2020 and Nov-2021).
- Passengers on international flights (**180.8 thousand**) represent 65.8% of total arrivals and increased by 12.6%.
  - TMAC: 4.8% (between Nov-2020 and Nov-2021).

SOURCE: GAP

## Monthly arrivals (expressed in thousands)



## Variation with respect to 2019







## LOS CABOS TOURISM OBSERVATORY

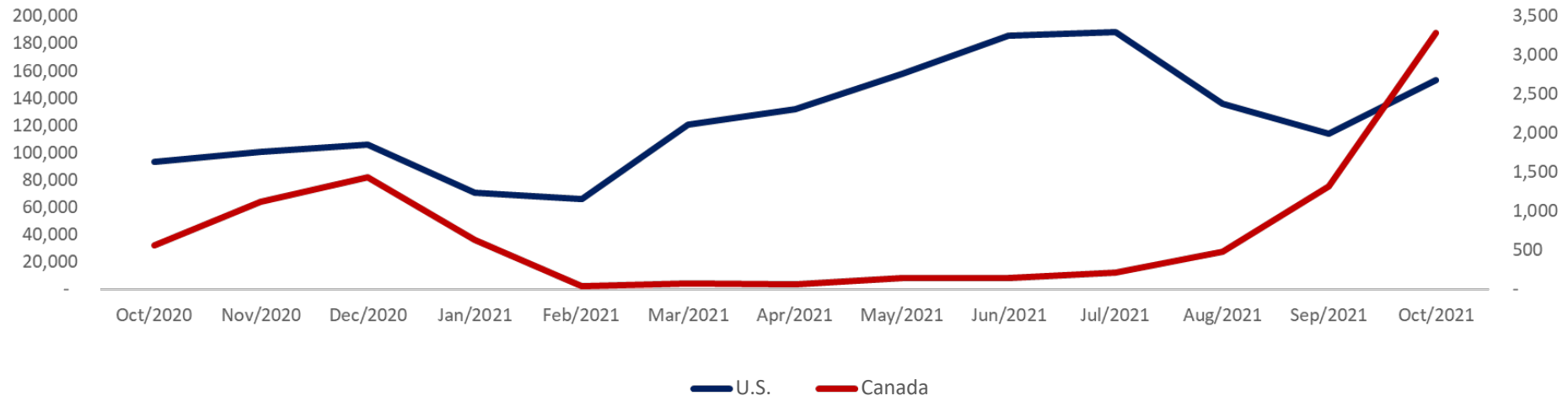
**PASSENGER ARRIVALS**  
**by nationality**



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

Regions	Oct/2020	Nov/2020	Dec/2020	Jan/2021	Feb/2021	Mar/2021	Apr/2021	May/2021	Jun/2021	Jul/2021	Aug/2021	Sep/2021	Oct/2021	Δ Oct 21 / Oct 19	Δ Jan-Oct 21 / Jan-Oct 19
U.S.	93,069	100,320	105,991	70,454	66,275	120,361	131,784	157,649	185,830	188,099	135,769	114,095	153,027	34.3%	2.4%
Canada	563	1,126	1,429	628	44	75	66	144	144	211	480	1,316	3,280	-55.4%	-94.6%
Europe	48	70	64	32	32	39	37	61	55	136	98	62	94	-79.0%	-92.2%
Caribbean, Central & South America	37	48	43	19	18	31	24	58	76	138	138	107	130	27.5%	-62.4%
Rest of the world	106	127	67	12	11	38	24	48	90	163	169	108	187	-76.1%	-90.2%
Grand total	93,823	101,691	107,594	71,145	66,380	120,544	131,935	157,960	186,195	188,747	136,654	115,688	156,718	27.8%	-6.7%

Key markets	Oct/2020	Nov/2020	Dec/2020	Jan/2021	Feb/2021	Mar/2021	Apr/2021	May/2021	Jun/2021	Jul/2021	Aug/2021	Sep/2021	Oct/2021	Δ Oct 21 / Oct 19	Δ Jan-Oct 21 / Jan-Oct 19
United Kingdom	9	21	18	5	16	16	8	25	15	50	48	7	27	-82.6%	-88.9%
Australia	18	42	19	3	1	4	4	4	12	18	21	15	19	-94.5%	-96.8%
South Korea	5	8	3	-	-	10	1	5	6	17	16	10	11	-93.9%	-93.2%
Key markets total	32	71	40	8	17	30	13	34	33	85	85	32	57	-91.6%	-93.7%



SOURCE: INM-SIOM

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

**+48.8%**

Oct-2021 vs. Oct-2019

In Oct-2021, Los Cabos International Airport recorded the arrival of 156,718 international tourists, up 27.8% compared to Oct-2019.

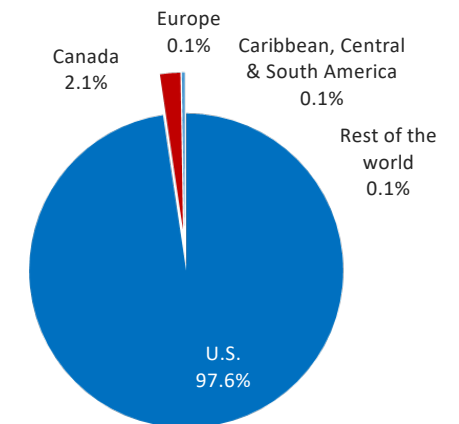
However, this growth is mainly due to a 34.3% increase in U.S. inbound tourists, while those from most other regions declined.

American tourists represent 97.6% of the total.

Annual variation of international tourist arrivals by air to Los Cabos International Airport (May-Oct-2021 vs. 2019)



Share of international tourist arrivals by air to Los Cabos International Airport (Oct-2021)



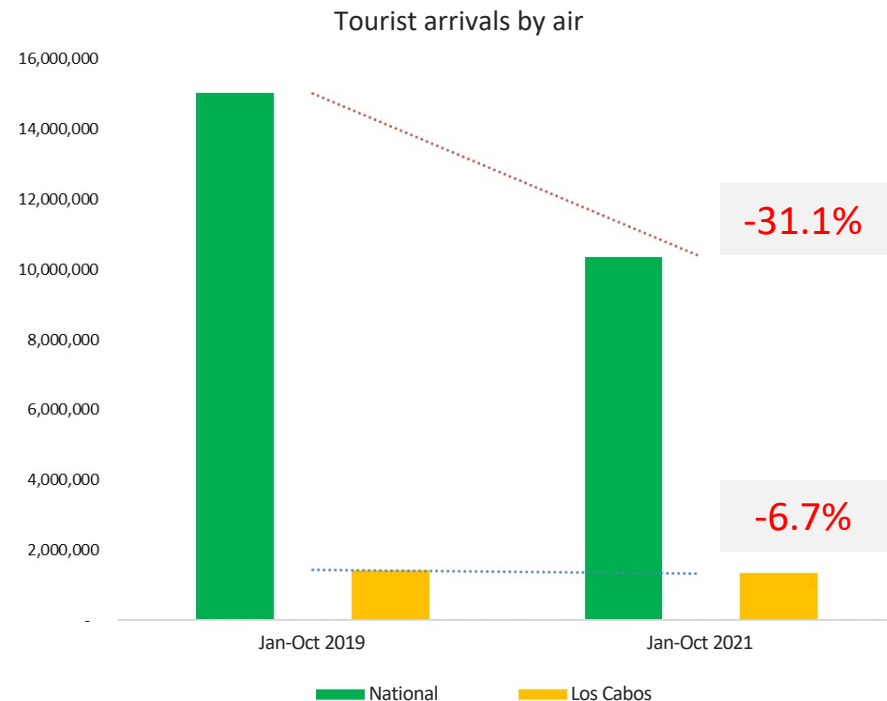
SOURCE: INM-SIOM



# International tourist arrivals by air, by origin (residence), Jan-Oct aggregate

Regions	National			Los Cabos		
	Jan-Oct 2019	Jan-Oct 2021	Δ 2021/2019	Jan-Oct 2019	Jan-Oct 2021	Δ 2021/2019
U.S.	8,818,853	8,190,015	-7.1%	1,291,923	1,323,343	2.4%
Canada	1,760,218	167,899	-90.5%	117,550	6,388	-94.6%
Europe	1,631,839	567,459	-65.2%	8,250	646	-92.2%
Caribbean, Central & South America	2,222,440	1,165,918	-47.5%	1,965	739	-62.4%
Rest of the world	598,683	268,941	-55.1%	8,675	850	-90.2%
<b>Grand total</b>	<b>15,032,033</b>	<b>10,360,232</b>	<b>-31.1%</b>	<b>1,428,363</b>	<b>1,331,966</b>	<b>-6.7%</b>

Key markets	National			Los Cabos		
	Jan-Oct 2019	Jan-Oct 2021	Δ 2021/2019	Jan-Oct 2019	Jan-Oct 2021	Δ 2021/2019
United Kingdom	488,308	46,397	-90.5%	1,959	217	-82.6%
Australia	52,963	3,299	-93.8%	3,165	101	-94.5%
South Korea	70,348	9,003	-87.2%	1,125	76	-93.9%
<b>Key markets total</b>	<b>611,619</b>	<b>58,699</b>	<b>-90.4%</b>	<b>2,242</b>	<b>394</b>	<b>-91.6%</b>



When comparing Jan-Oct-2021 to 2019, international tourist arrivals by air decreased 31.1% nationwide and 6.7% in Los Cabos.

- On a national level, the U.S. travel market decreased by 7.1%, whereas the Canadian travel market did so by 90.5%.
- In Los Cabos International Airport, the U.S. travel market grew by 2.4%, while the Canadian travel market decreased by 94.6% when comparing both periods.

SOURCE: INM-SIOM



## LOS CABOS TOURISM OBSERVATORY

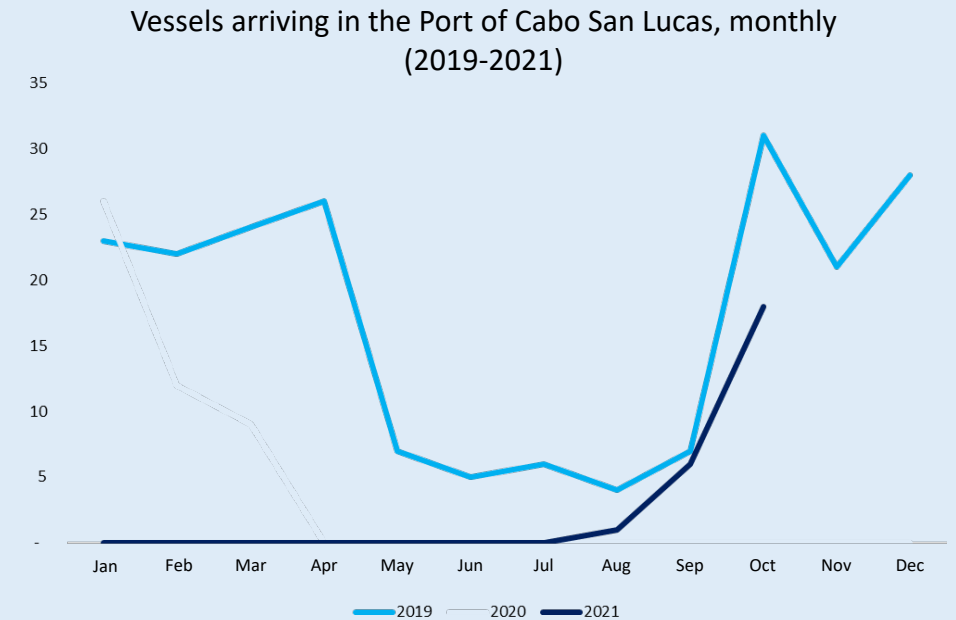
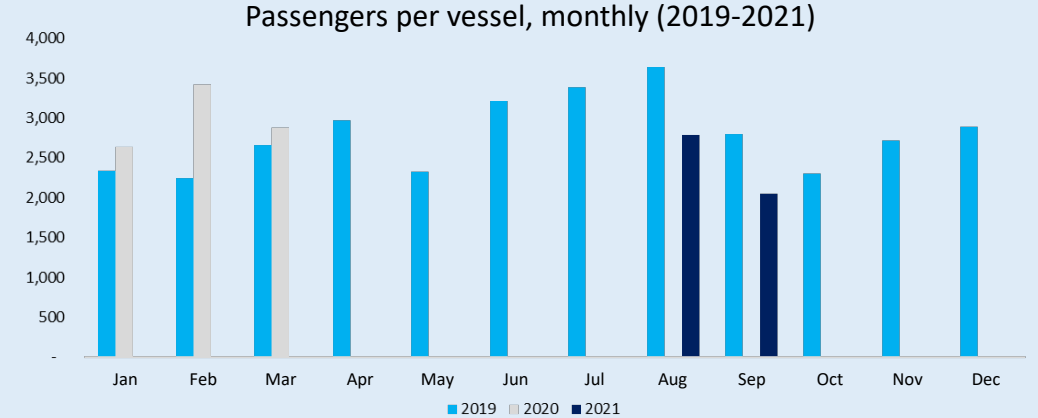
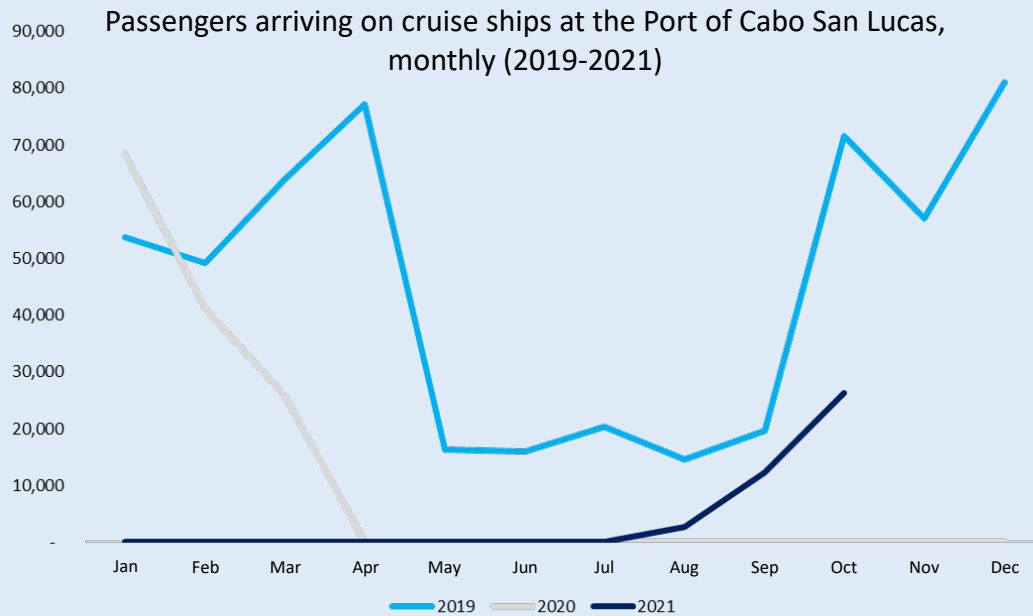
**YACHT AND CRUISE SHIP ACTIVITY**



# Cruise activity (Oct-2021)

Cruise operations continued to recover in Oct-2021, with **18 vessels** arriving at the port of Cabo San Lucas **carrying a total of 26,283 passengers** (down 63.3% compared to 2019).

SOURCE: DATATUR-SCT



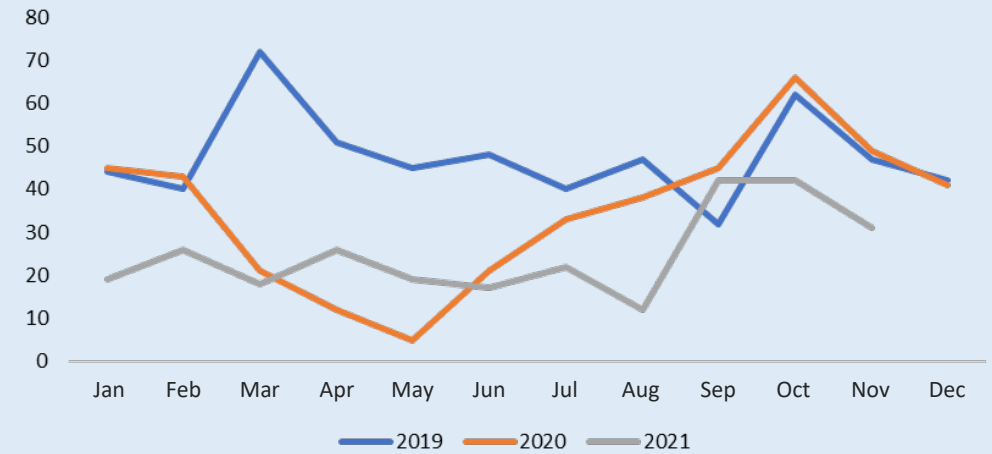


# Yacht arrivals at the Port of Cabo San Lucas (Nov-2021)

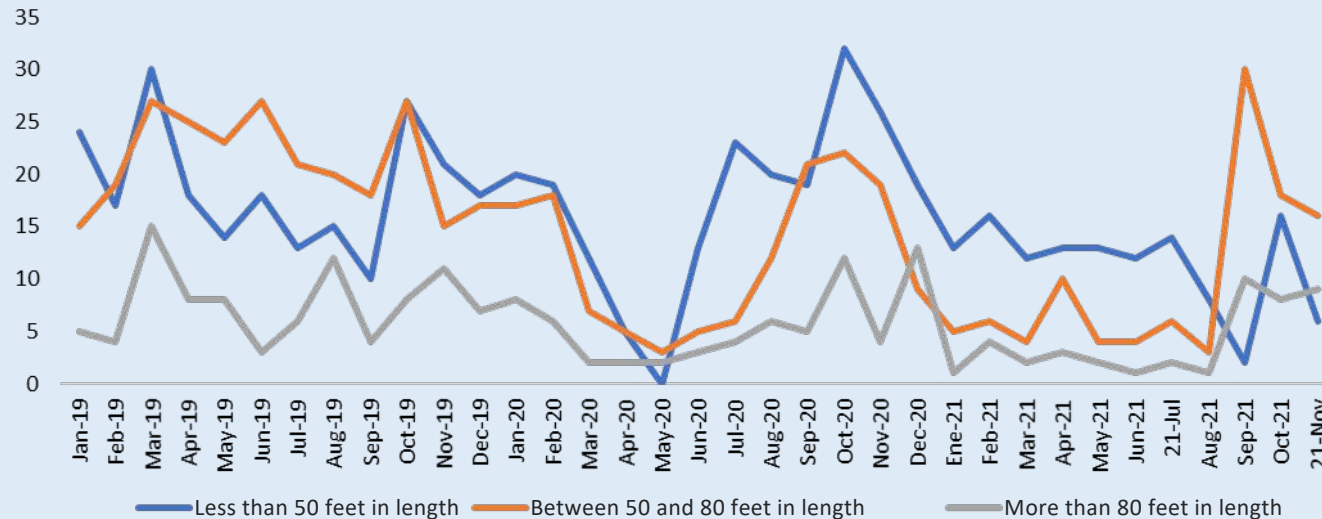
- 31 yachts arrived at the Port of Cabo San Lucas in Nov-2021. This represents a decrease of 34% compared to the same period in 2019.
- 52% were medium-sized vessels that measured between 50 and 80 feet in length.

SOURCE: API Cabo San Lucas

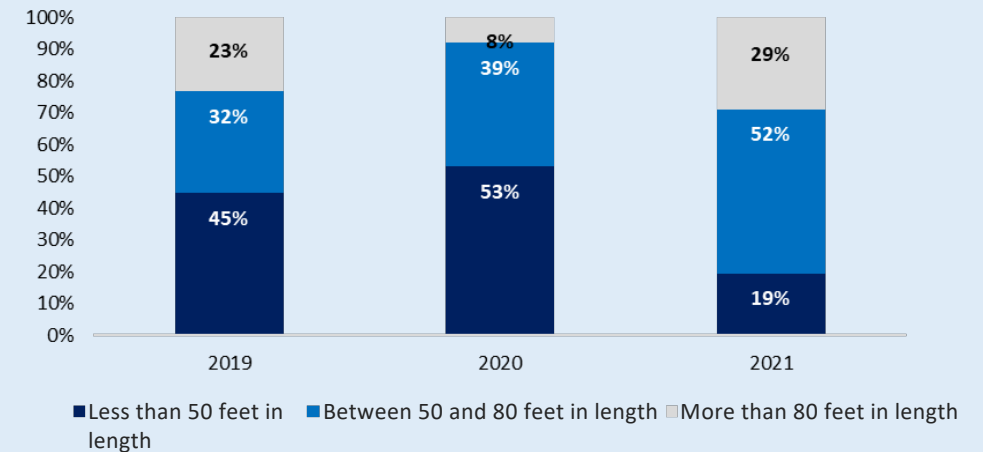
Total yacht arrivals, monthly (2019-2021)



Monthly evolution, by vessel size (2019-2021)



Arrivals distribution, by vessel size (November)





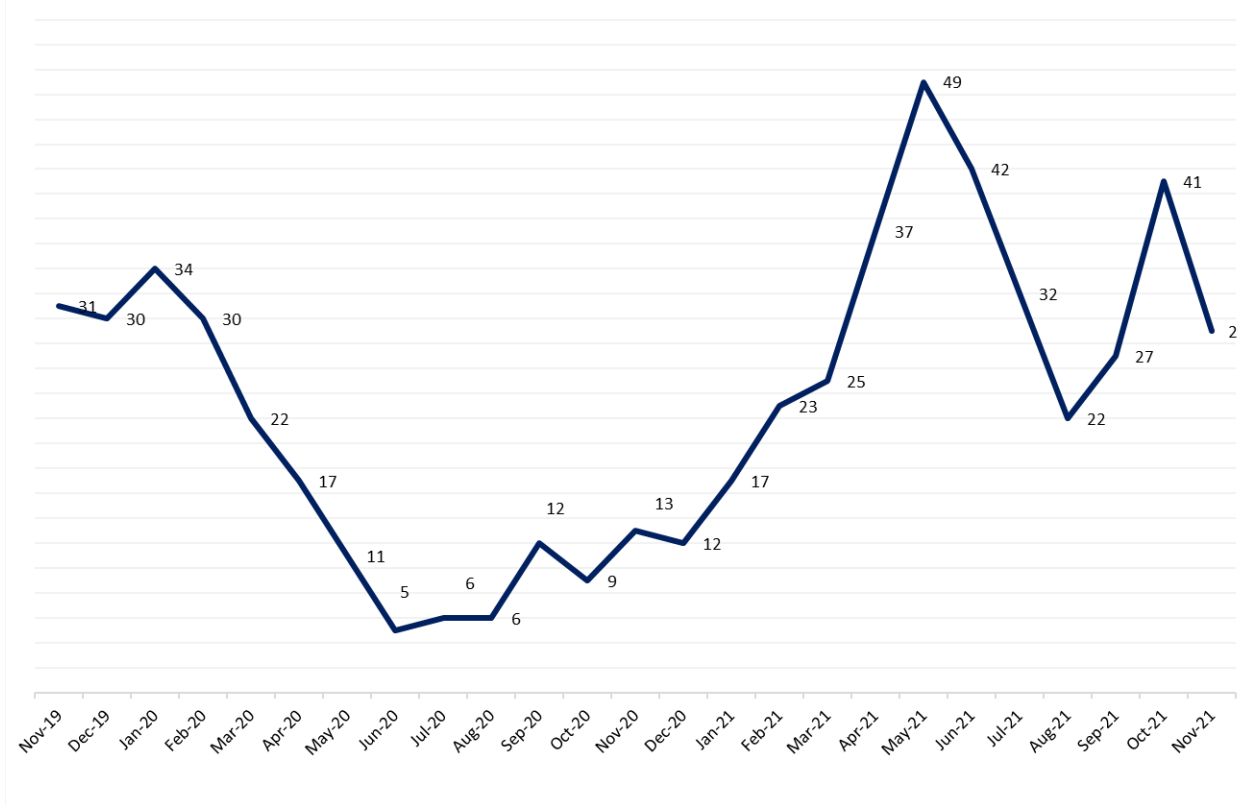
## LOS CABOS TOURISM OBSERVATORY

**TOURIST SURVEYS & GROUP BUSINESS**



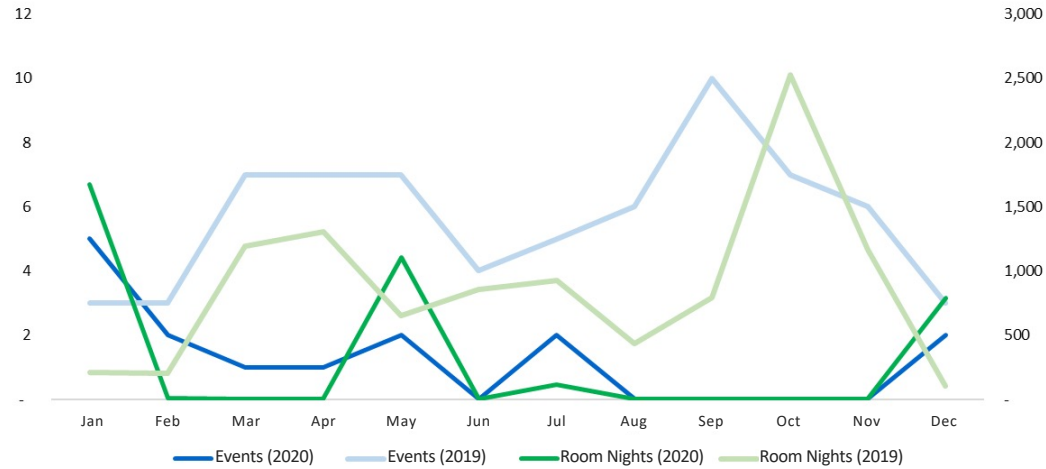
# Group Business

RFPs received from meeting and group events, last 24 months (CVENT)



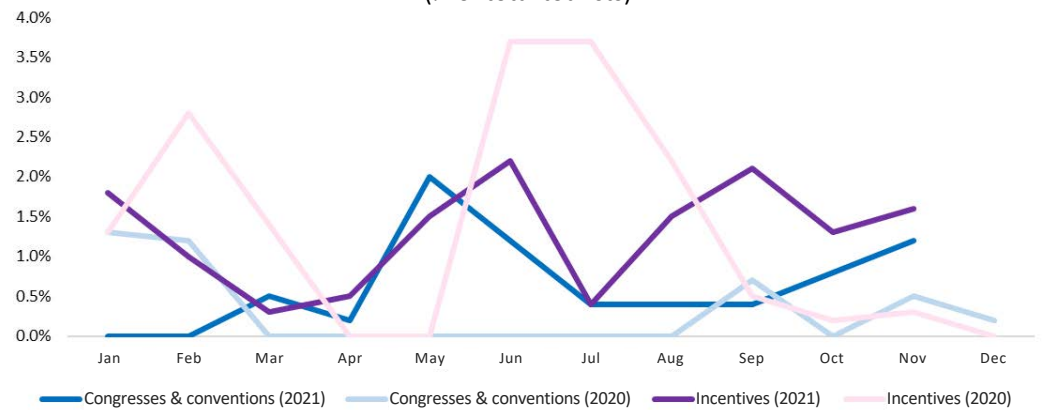
SOURCE: CVENT

Confirmed room nights and events for meetings and groups



SOURCE: HELMS BRISCOE

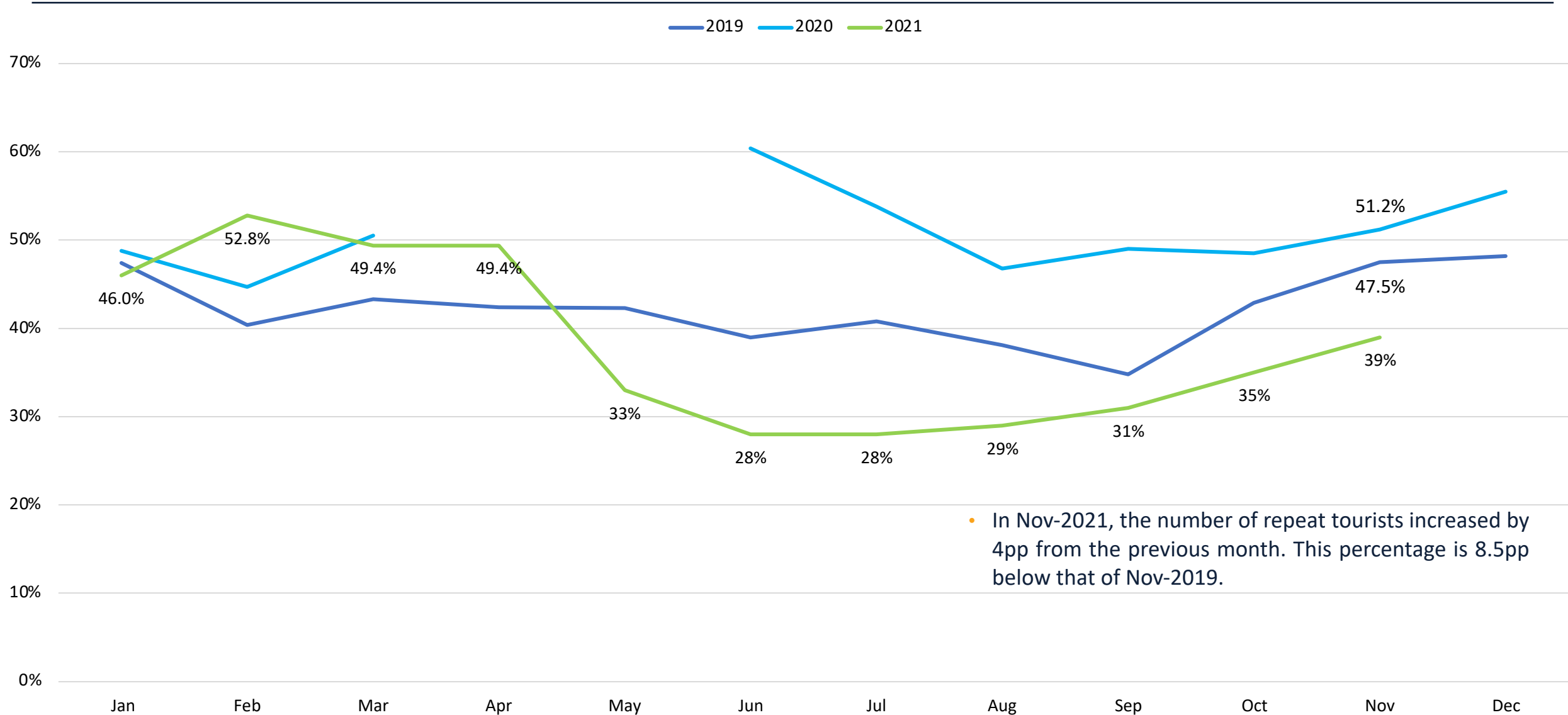
Attendees to congresses, conventions and incentive trips (% of total tourists)



SOURCE: TOURIST SURVEYS



# Return rate to the destination

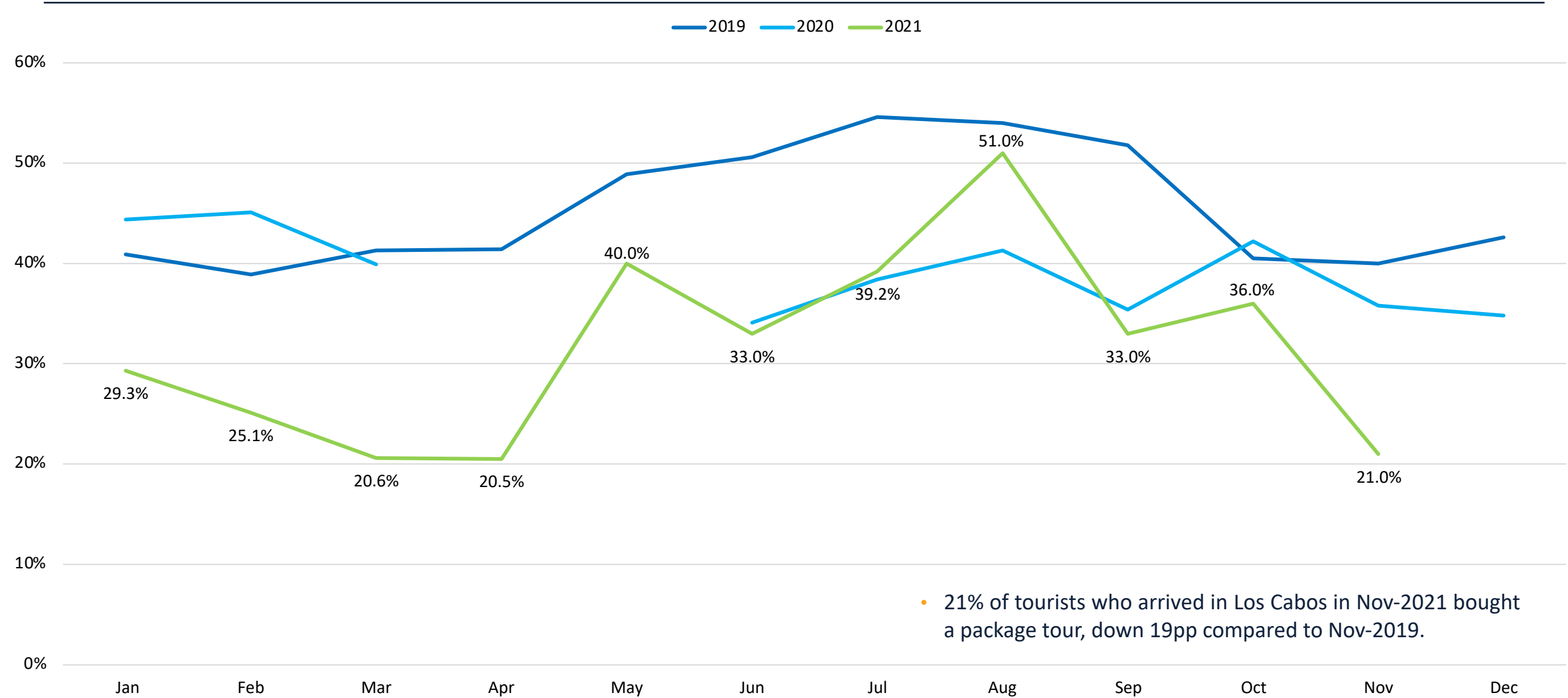


- In Nov-2021, the number of repeat tourists increased by 4pp from the previous month. This percentage is 8.5pp below that of Nov-2019.

SOURCE: TOURIST SURVEYS

NO INFORMATION WAS COLLECTED DURING APR-MAY-2020 DUE TO THE CONTINGENCY GENERATED BY COVID-19.

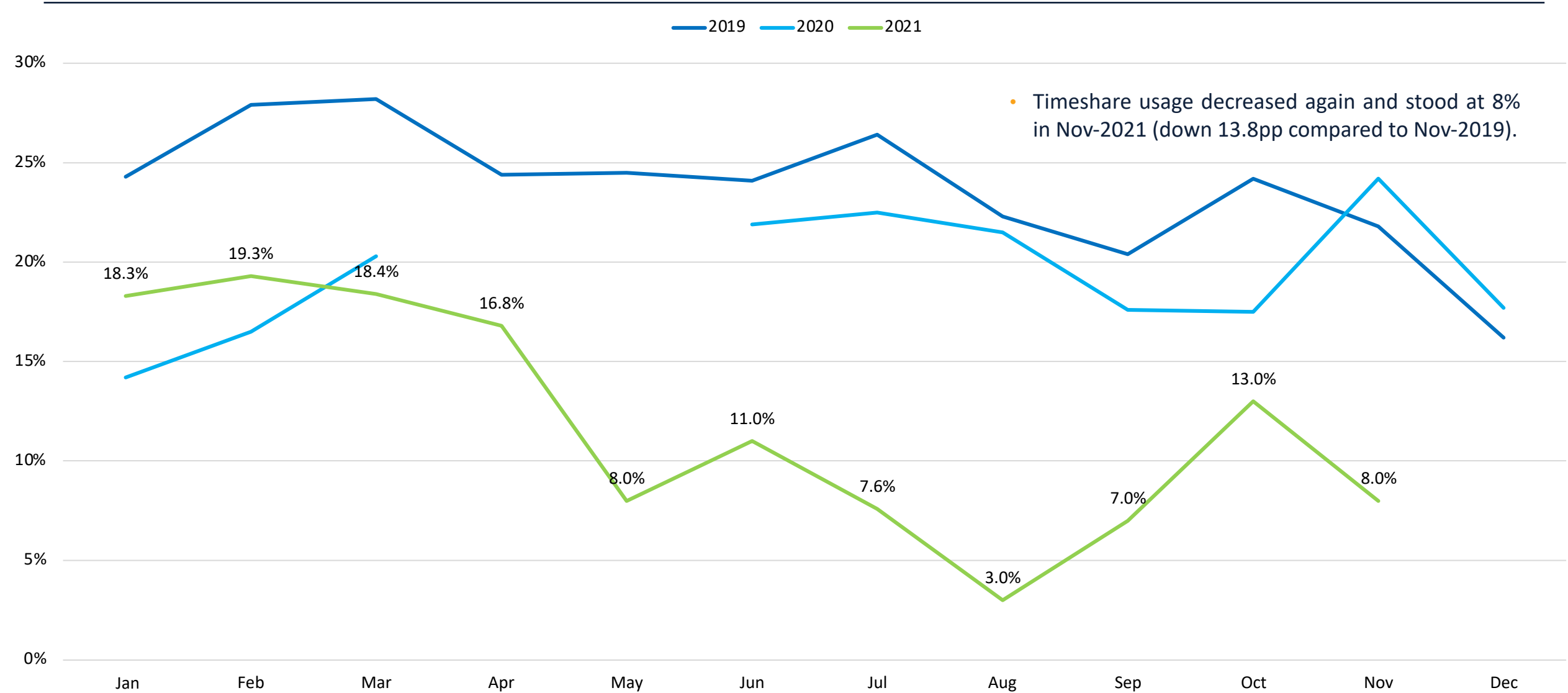
# Package tour purchases



- 21% of tourists who arrived in Los Cabos in Nov-2021 bought a package tour, down 19pp compared to Nov-2019.

SOURCE: TOURIST SURVEYS  
NO INFORMATION WAS COLLECTED DURING APR-MAY-2020 DUE TO THE CONTINGENCY GENERATED BY COVID-19.

# Timeshares



SOURCE: TOURIST SURVEYS  
NO INFORMATION WAS COLLECTED DURING APR-MAY-2020 DUE TO THE CONTINGENCY GENERATED BY COVID-19.





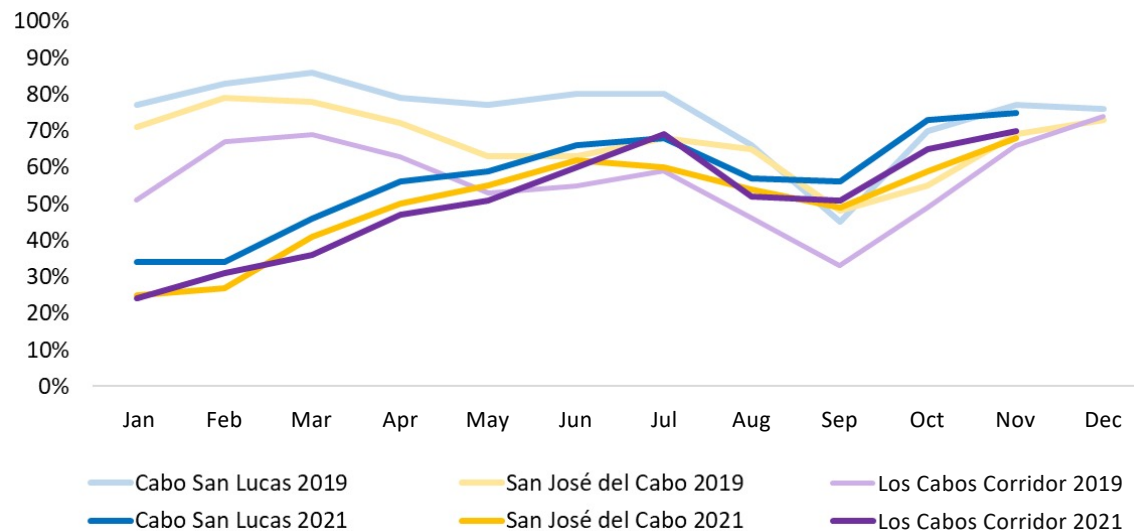
## LOS CABOS TOURISM OBSERVATORY

**SUPPLY INDICATORS**  
**Hotel Performance**



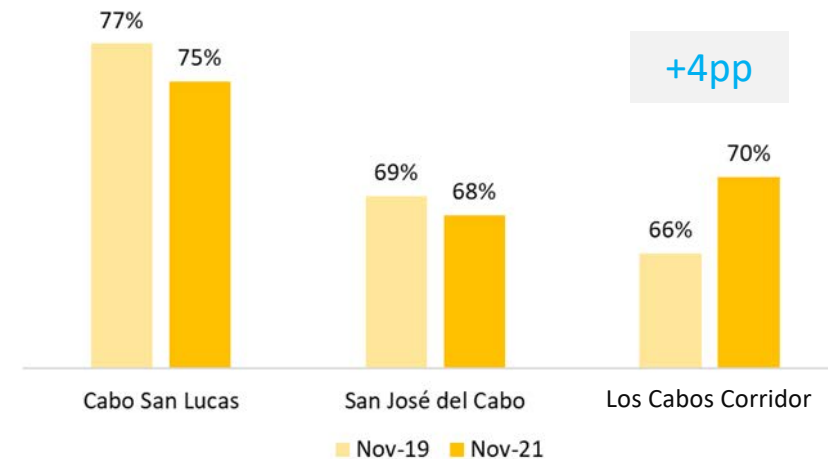
# Evolution of the hotel supply in Los Cabos and sub-destinations

Monthly hotel occupancy (2019-2021)



SOURCE: AHLC

Hotel occupancy, current month (2019-2021)

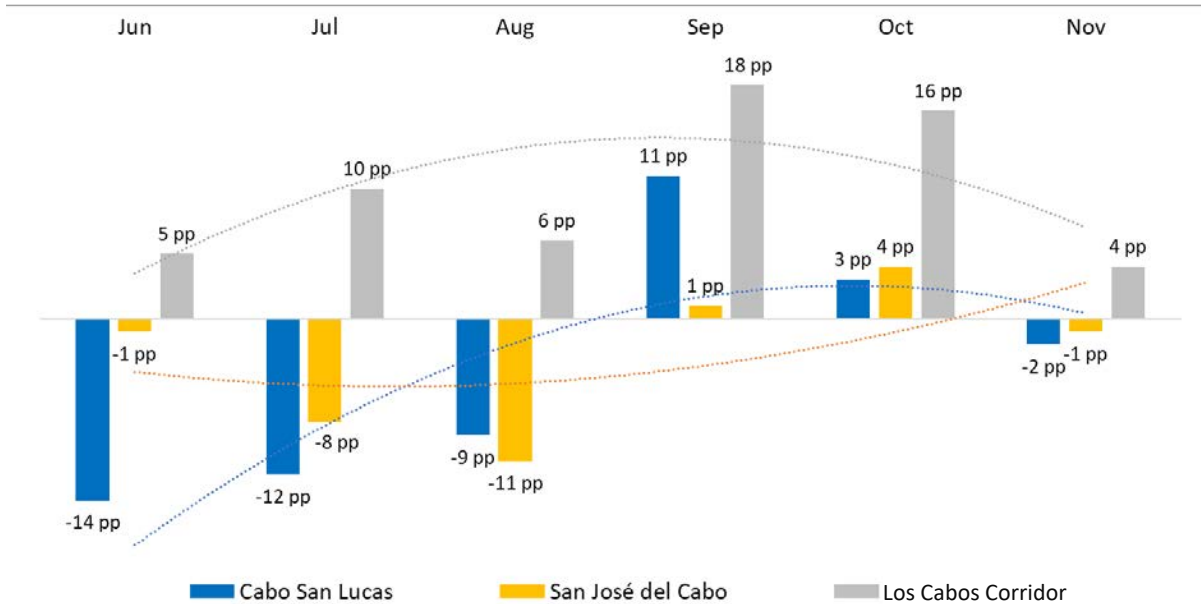


SOURCE: AHLC

- According to the Los Cabos Hotel Association, hotel occupancy in Los Cabos reached 73% during Nov-2021, matching 2019 occupancy levels. On a sub-destination level, Cabo San Lucas and San Jose del Cabo were at 75% and 68% (both decreased by 2pp and 1pp, respectively, compared to 2019). Furthermore, hotel occupancy in Los Cabos Corridor increased by 4pp and stood at 70%.
- In Oct-2021, 238,594 tourists arrived at hotels in Los Cabos, 23.5% more than in Oct-2019. However, the average stay decreased by 0.23 nights (4.73, according to DataTur).
  - Domestic tourist arrivals at hotels fell by 1.7% in this period, while international tourism grew by 33.8%.
  - In Oct-2021, domestic tourism represented 23% of the total. A share of 28.9% was recorded in 2019.

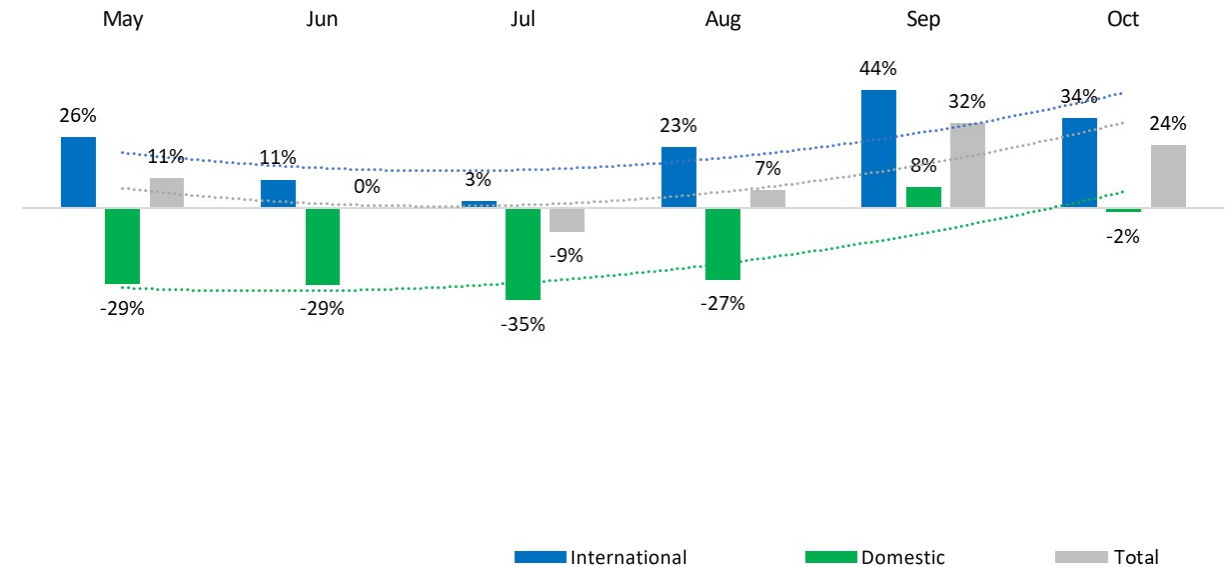
# Evolution of the hotel supply in Los Cabos and sub-destinations

Annual variation in hotel occupancy, by destination  
(Jun-Nov-2021 vs. 2019)



SOURCE: AHLC

Annual variation of tourist arrivals at hotels, by origin  
(May-Oct-2021, vs. 2019)



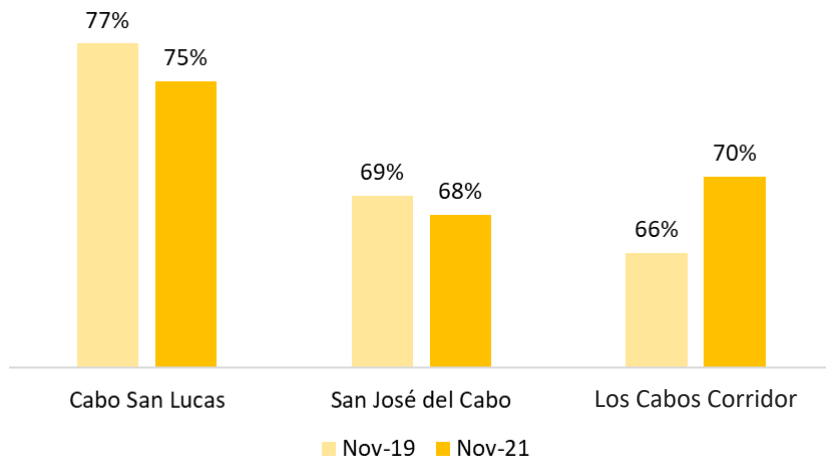
SOURCE: DATATUR

- Compared to Nov-2019, hotel occupancy in Cabo San Lucas and San Jose del Cabo decreased by 2pp and 1pp, respectively.
- However, Los Cabos Corridor has shown growth for six consecutive months, reaching a 4pp increase compared to 2019.



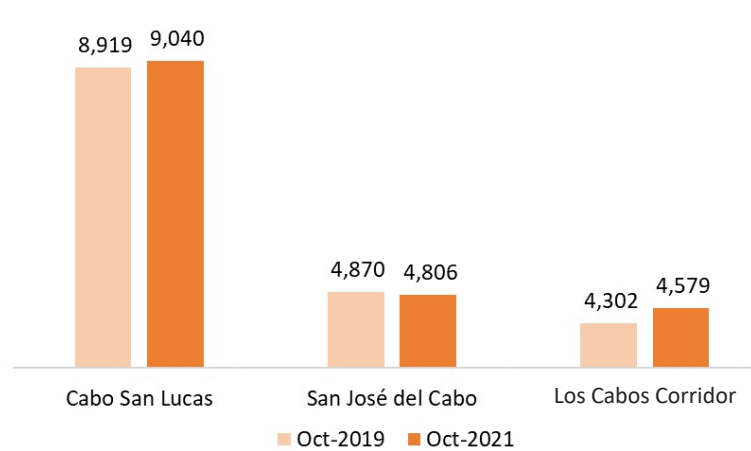
# Evolution of the hotel supply in Los Cabos and sub-destinations

Hotel occupancy (November 2019-2021)



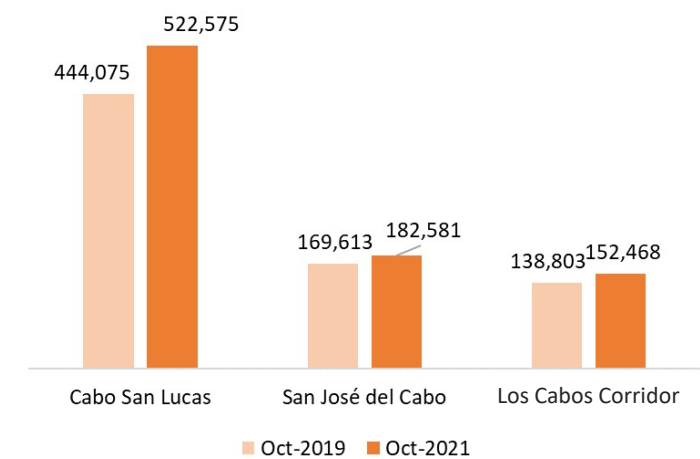
SOURCE: AHLC

Rooms available (October 2020-2021)



SOURCE: DATATUR

Room nights (October 2019-2021)



SOURCE: DATATUR

## CABO SAN LUCAS

- Hotel occupancy was at 75%, implying a decrease of 2pp (Nov-2021 vs. Nov-2019, AHLC).
- Its hotel supply increased 1.4% between Oct-2019 and Oct-2021, registering a total of 9 thousand rooms (DataTur).
- Occupied room nights **increased 17.7%** between Oct-2019 and Oct-2021 (DataTur).

## SAN JOSE DEL CABO

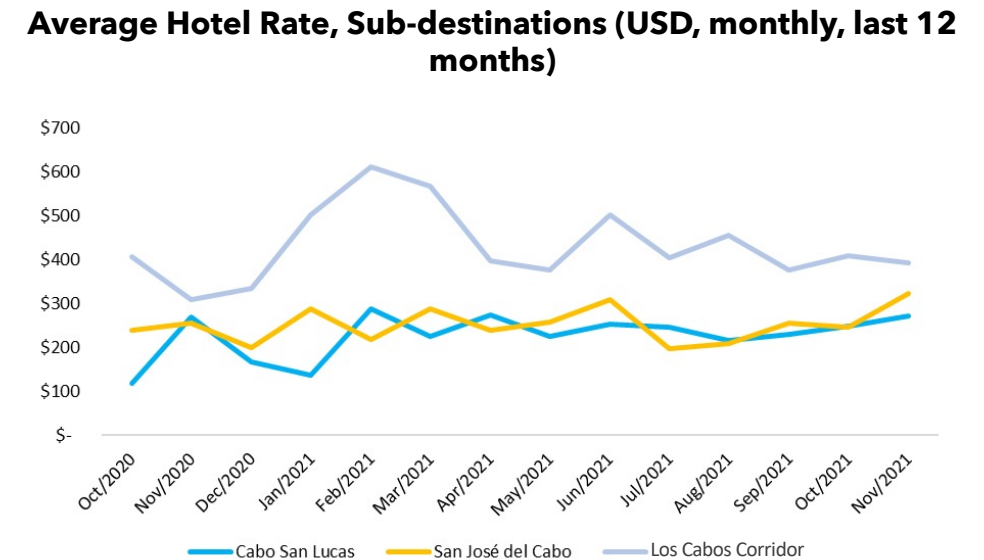
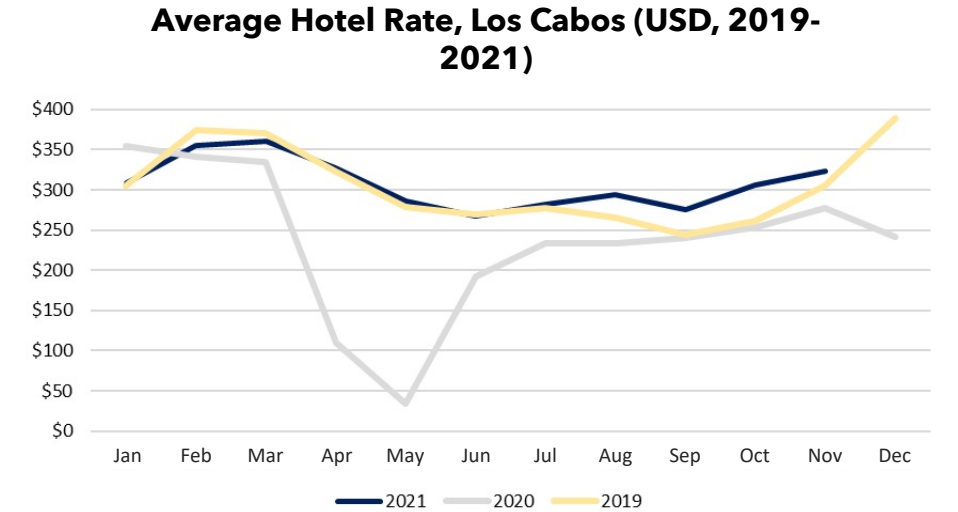
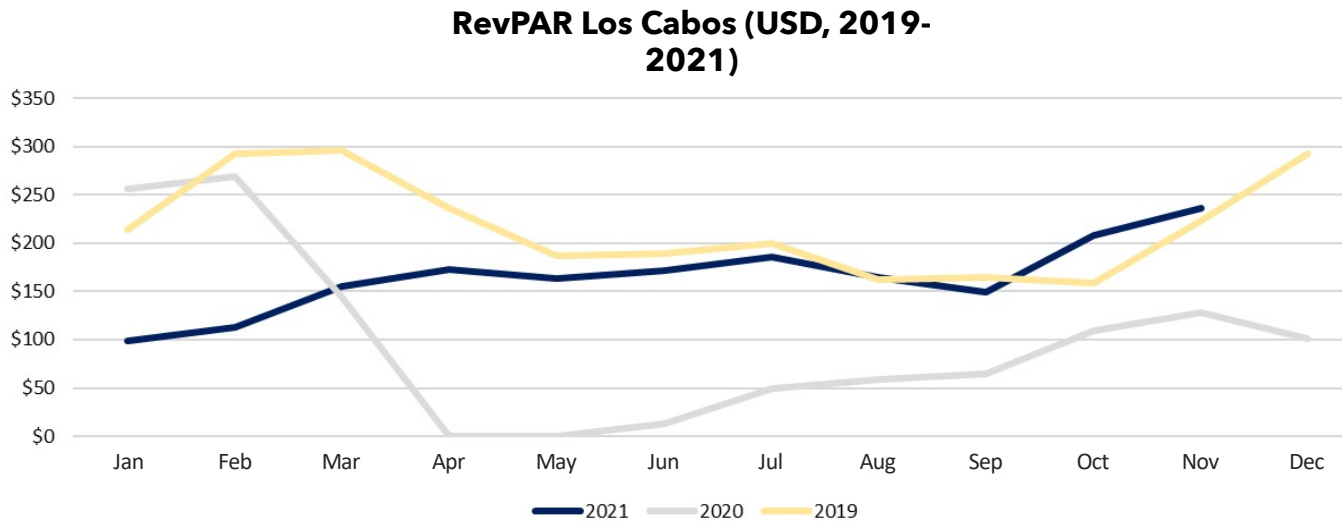
- Occupancy dropped 1pp (68%) when comparing Nov-2021 to Nov-2019 (AHLC).
- Its hotel supply decreased 1.3% between Oct-2019 and Oct-2021, registering a total of 4.8 thousand rooms (DataTur).
- Occupied room nights **increased 7.6%** between Oct-2019 and Oct-2021 (DataTur).

## LOS CABOS CORRIDOR

- Occupancy was at 70% in Nov-2021, implying an increase of 4pp (AHLC).
- Its hotel supply increased 6.4% between Oct-2019 and Oct-2021, registering a total of 4.6 thousand rooms (DataTur).
- Occupied room nights **increased 9.8%** between Oct-2019 and Oct-2021 (DataTur).

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

- The average hotel rate in Los Cabos for Nov-2021 was USD 323, 21 dollars above the last 12-month average (\$302) and 17 dollars above that of Nov-2019.
  - Cabo San Lucas recorded an **increase of 28.3% (USD 60)** and now stands at USD 272.
  - San Jose del Cabo **increased its rate by 87.8% (USD 151)** and now stands at USD 323.
  - Compared to 2019, the rate in Los Cabos Corridor **increased by 8.3% (USD 30)** and recorded USD 393.
- The RevPAR in Nov-2021 was USD 236, **up 13 dollars (+5.6%)** compared to Nov-2019.



SOURCE: AHLIC



## LOS CABOS TOURISM OBSERVATORY

**SUPPLY INDICATORS**  
**Air Connectivity**

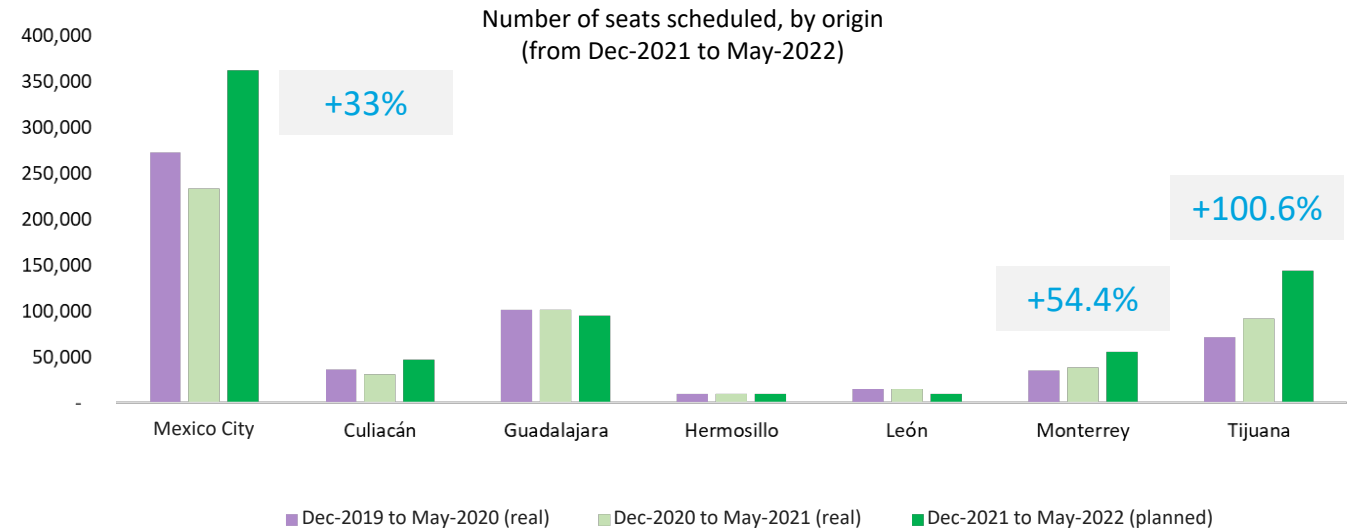
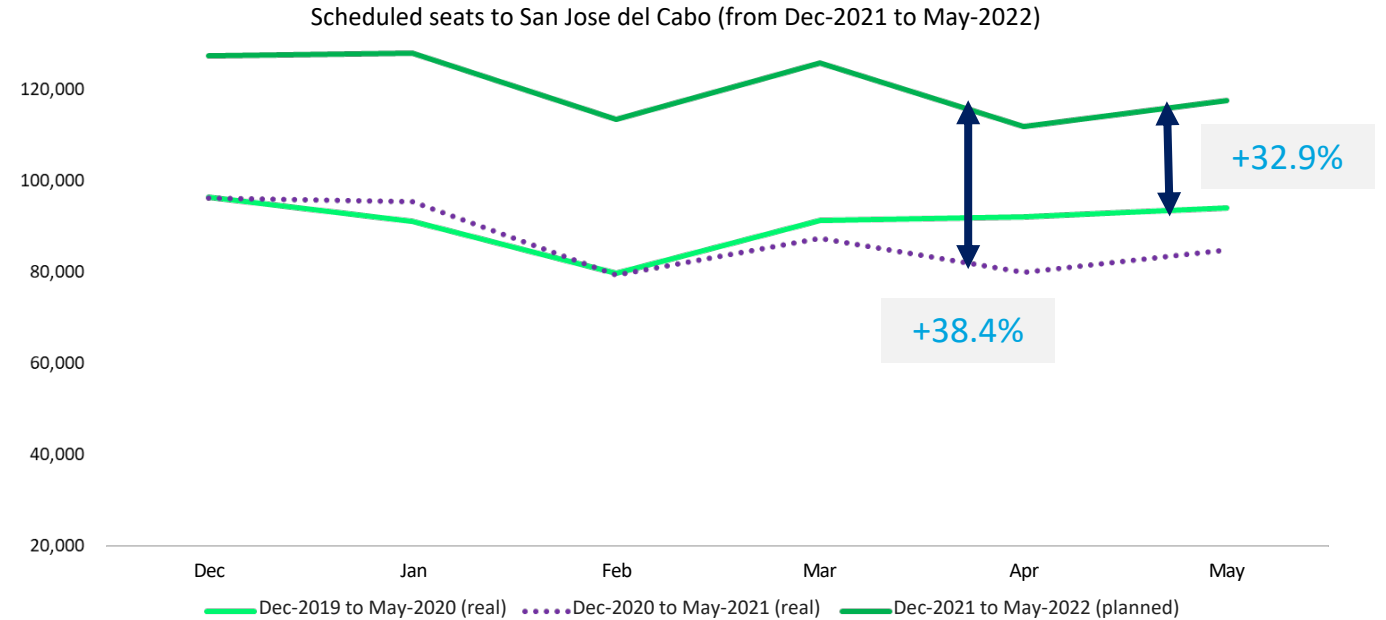


# Domestic air connectivity

## SEATS SCHEDULED FROM DEC-2021 TO MAY-2022

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

- There are 724,354 seats scheduled for the next six months, **32.9% more** compared to the same period in 2019.
  - However, when comparing the seats scheduled for the next six months against the 2020 schedule (pandemic), the volume of programmed seats is **38.4% higher**.
  - There are **32% more** available seats expected for Dec-2021 than those scheduled for Dec-2019.
- Mexico City, GDL, and Tijuana are the most relevant issuing markets, having 50%, 13%, and 20% of total available seats (for the next six months), followed by Monterrey (8%), Culiacan (7%), Leon (1%), and Hermosillo (1%).
  - Seats from CDMX, MTY, and TIJ increased by 33%, 54.4%, and 100.6%, respectively (when compared against 2019). However, BJX decreased by 39.1%. Consequently, TIJ's market share grew 2pp during these six months, and BJX's dropped 2pp.
- For the next six months, 52% of the available seats will be provided by Volaris, followed by Viva Aerobus with 31% and Aeromexico with 17%. Interjet has dropped to 0%.
  - It's worth noting that this corresponds to the information provided on the OAG portal. However, given the flight suspensions announced by the airline and the sales restrictions implemented by IATA, this number would likely change.
- Load factors of domestic airlines for Sep-2021 were: Aeromexico (72%), Viva Aerobus (73%), and Volaris (77%).



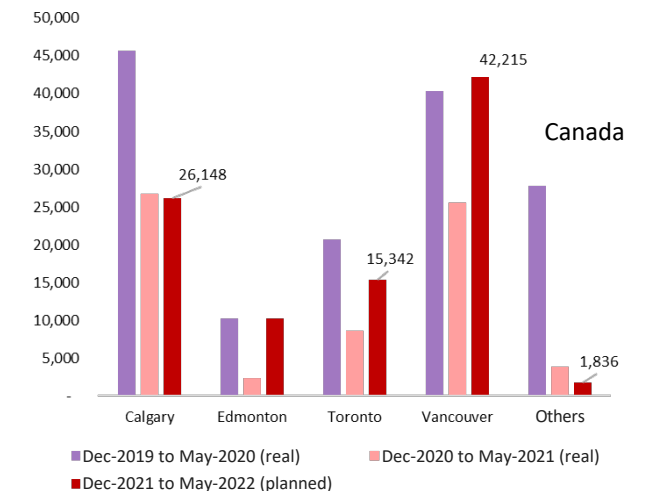
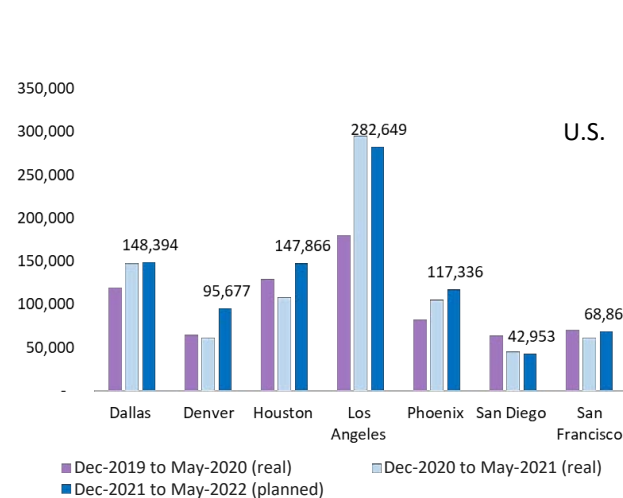
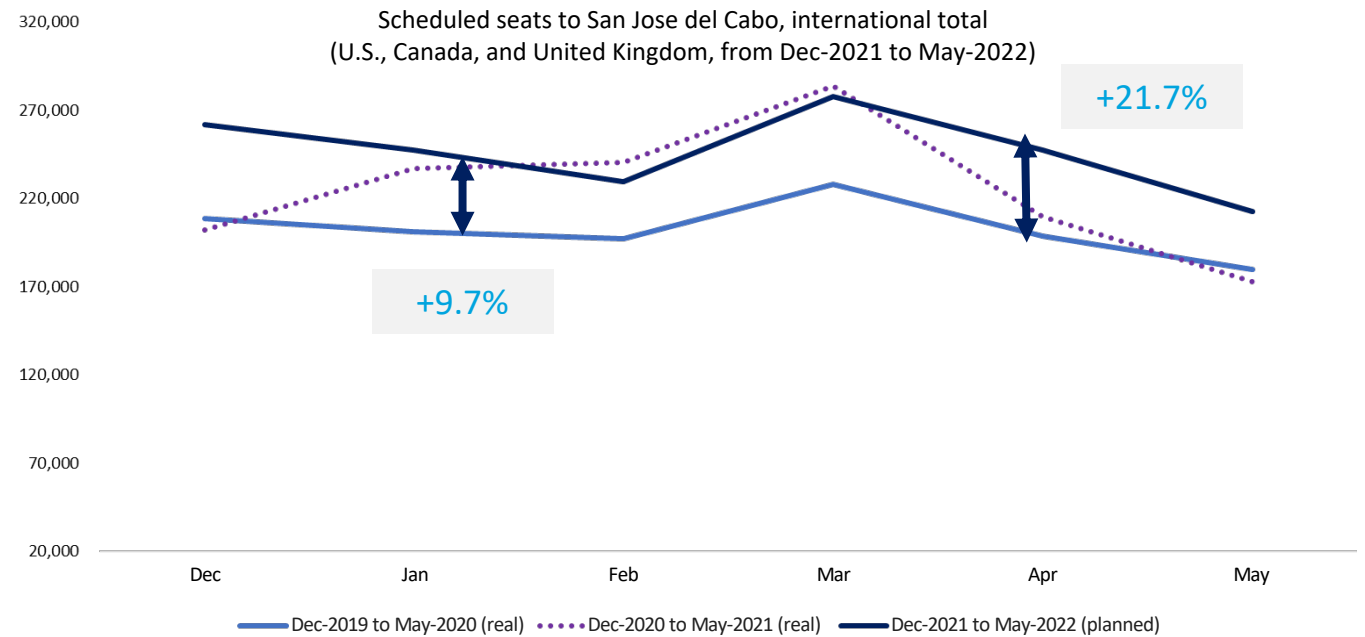


# International air connectivity

## SEATS SCHEDULED FROM DEC-2021 TO MAY-2022

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

- For the U.S., there are 1.38 million seats scheduled for the next six months, which is **21.7% more** seats compared to the same period in 2019.
  - However, when comparing the seats scheduled for the next six months against the 2020 schedule (pandemic), the volume of programmed seats is **9.7% higher**.
  - LAX (+57%), PHX (+43%), HOU (+14.1%), DFW (+24.3%), DEN (+46.6%), and SEA (+25.7%)** have the most significant increase vs. 2019. However, a decrease of 33.1% is observed in San Diego.
  - Los Angeles is the main issuing market in the U.S. (20% of the market), followed by DFW, Houston (11% each), and Phoenix (8%).
  - American, Alaska, Delta, Southwest, and United Airlines are the most relevant (90% as a whole).
  - For Dec-2021, the United States expects 37% more seats than those scheduled for 2019.
- For Canada, there are 95,813 seats scheduled for the next six months, which is **33.8% fewer** seats compared to the same period in 2019.
  - When comparing the seats scheduled for the next six months against the 2020 schedule (pandemic), the volume of programmed seats is 42.5% higher.
  - There are 45% fewer seats expected for Dec-2021 than those scheduled for 2019.
  - A decline is anticipated in Calgary (-42.8%) and Toronto (-26%) within the next six months. Vancouver is expected to increase by 24.6% compared to 2019.
  - During this period, Air Canada and WestJet will reduce the number of seats by 34.3% and 21.6%, respectively. On the other hand, **Flair Airlines has added 11 thousand seats**.
- Load factors of international airlines for Sep-2021 were: American (66%), Alaska (69%), Delta (64%), United (61%), and Southwest (73%).





## LOS CABOS TOURISM OBSERVATORY

PUBLIC RELATIONS





# Public relations: notes and scope

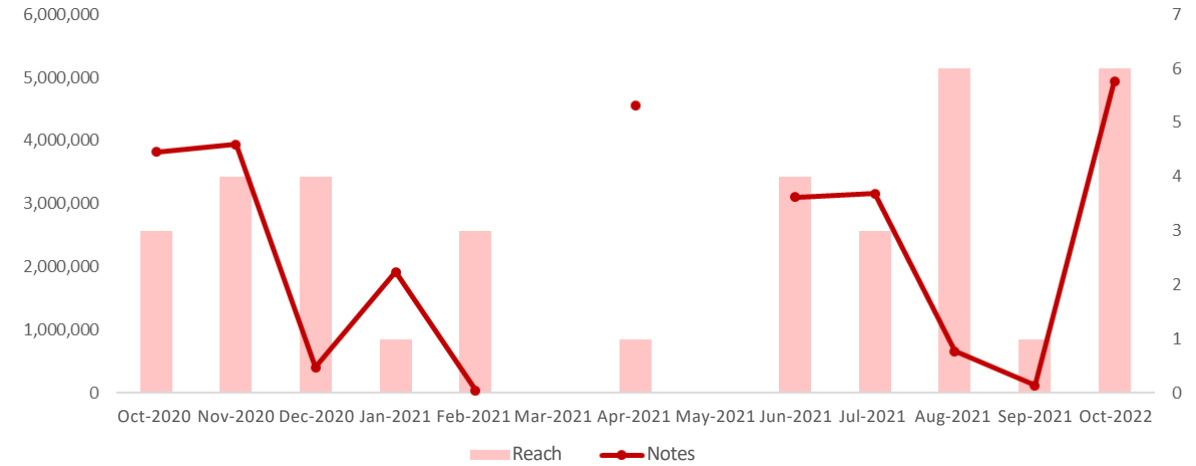
- **In the domestic market:**

- During Nov-2021, 122 placements were introduced, accounting for 11.7 million impressions. An average of 45 placements has been published monthly since the pandemic started in April 2020, with **a monthly reach of 3.8 million**.

- **In the international market:**

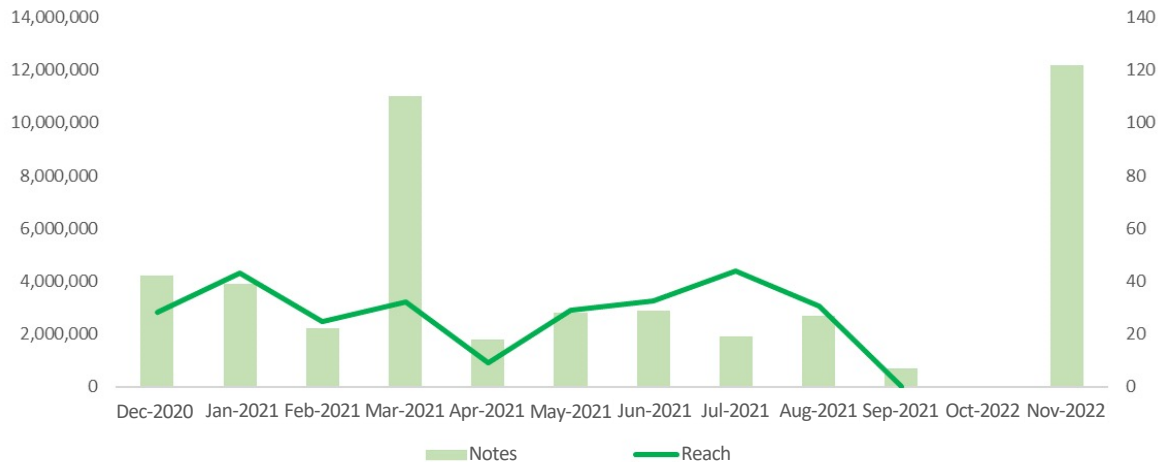
- In Nov-2021, 26 placements and 477 million impressions were achieved in the United States. An average of 22 placements has been published monthly since the pandemic started, with **a monthly reach of 670 million**.
- 6 notes were delivered to the Canadian market throughout Oct-2021, achieving 4.9 million impressions. An average of 5 placements has been published monthly since April, with **a monthly reach of 3.8 million**.

NOTES MADE FOR THE CANADIAN MARKET – TOTAL & REACH



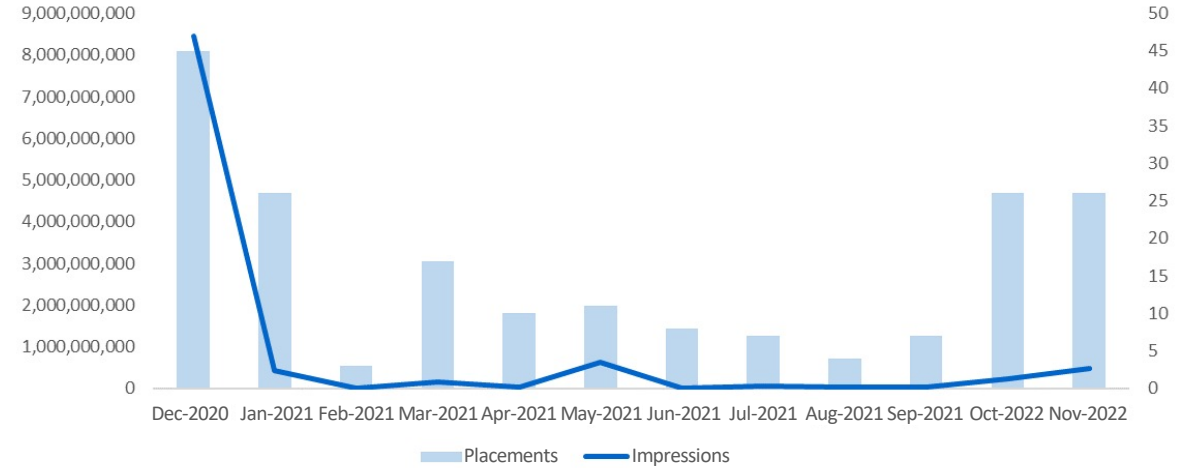
SOURCE: JESSON+CO

NOTES MADE FOR THE DOMESTIC MARKET – TOTAL & REACH



SOURCE: GAUDELLI (Feb-2018 to Jan-2019), LLORENTE & CUENCA (Feb-2019 to Nov-2021)

NOTES MADE FOR THE U.S. MARKET – TOTAL & REACH



SOURCE: NJF (Feb-2018 to Jan-2019), OGILVY (Feb-2019 to Nov-2021)



## LOS CABOS TOURISM OBSERVATORY

### IMPACT OF COVID-19

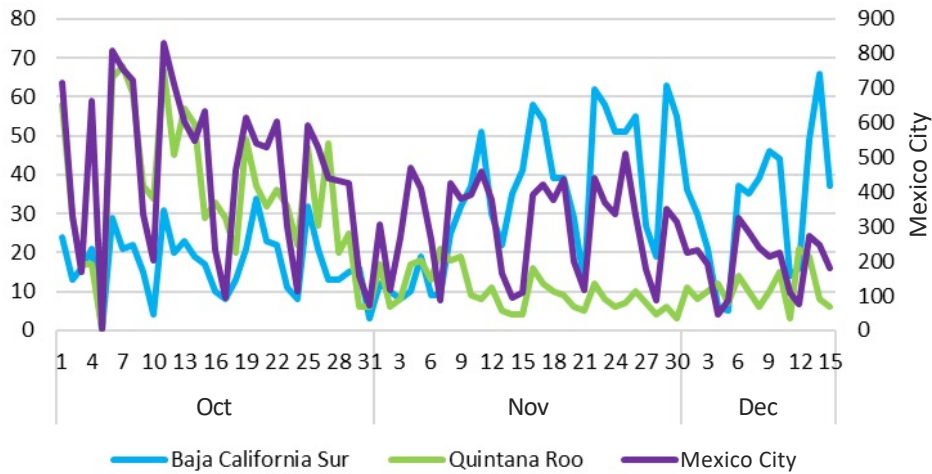
Effects of COVID-19 on Mexico's  
tourism sector.



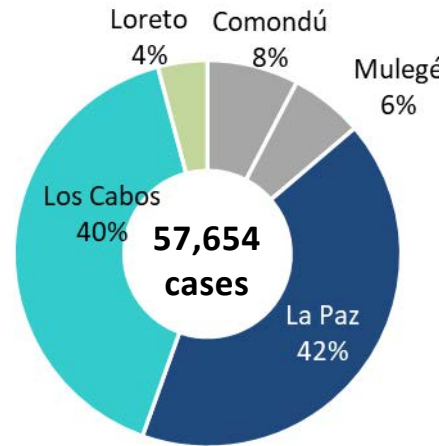


# Confirmed COVID-19 cases - overview

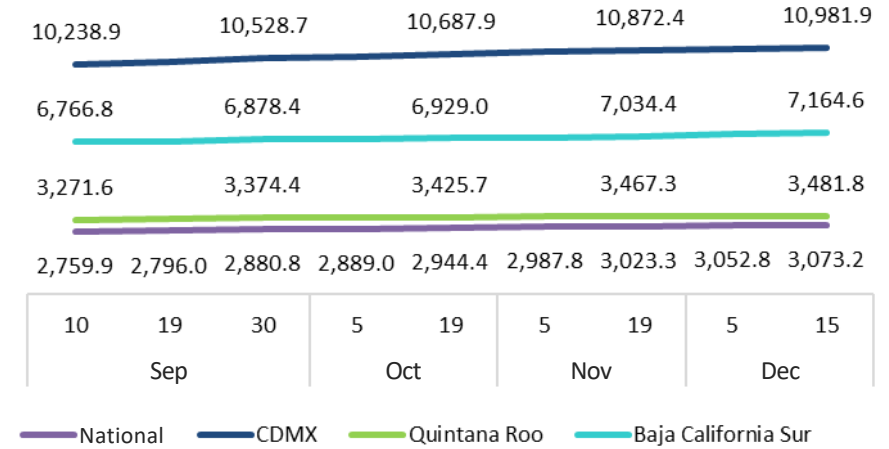
Number of daily new cases



Confirmed cases by municipalities in B.C.S.



Incidence of infection



## Total confirmed cases as of December 15th, 2021

### National

**3.93 million**

- 67 thousand more cases since November 19th.

### Baja California Sur

**57,654**

- 1,048 more cases than those recorded by November 19th.

### Quintana Roo

**60,000**

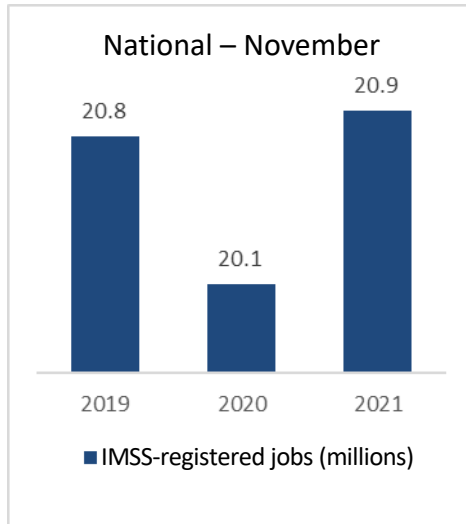
- 249 more cases in the same period.

- La Paz and Los Cabos jointly account for 82% of the total confirmed cases statewide.
- Los Cabos has 249 more cases, adding up to a total of 23,127.
- La Paz has 420 more cases than those recorded as of November 19th, accumulating a total of 24,028 confirmed cases.
- Loreto accumulates 2,373 cases (35 more).

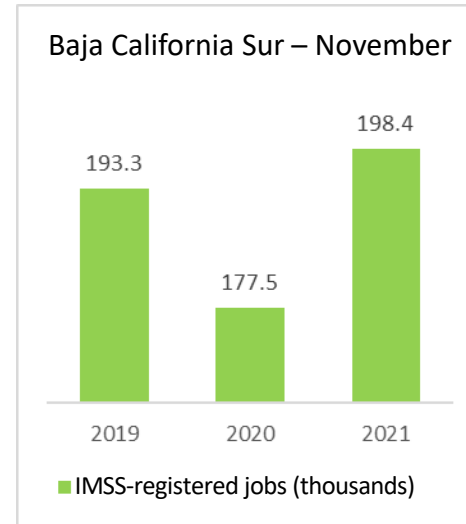
- The national average rate of infection is 3,073 cases per 100 thousand inhabitants.
- Mexico City recorded the highest rate of COVID-19 cases, which is above the national average of 10,982.
- Quintana Roo: 3,482.
- Baja California Sur is the second state with the highest rate: 7,165.

SOURCE: SECRETARIAT OF HEALTH, GENERAL DIRECTORATE OF EPIDEMIOLOGY ([www.coronavirus.gob.mx](http://www.coronavirus.gob.mx)). FIGURES UPDATED AS OF DECEMBER 17th, 2021.

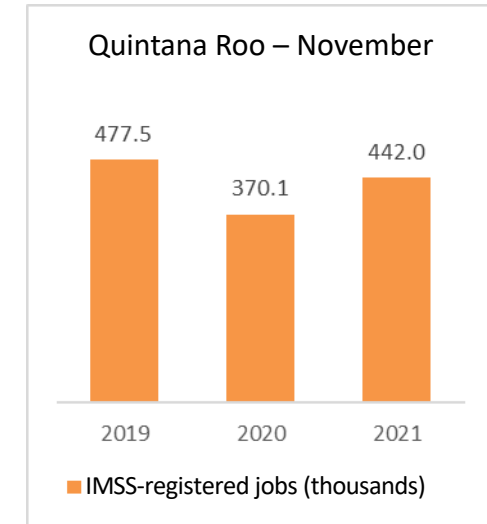
# Effects on employment in Mexico



- As of November 30th, 2021, IMSS had registered 20,933,050 jobs in the country, which is 0.6% more than those reported in Nov-2019.
- Mexico has 1,159,318 more jobs compared to the end of Dec-2020.



- Baja California Sur closes Nov-2021 with 198,399 jobs, 2.7% more than in Nov-2019.
- The state has 29,028 more jobs compared to the end of Dec-2020.

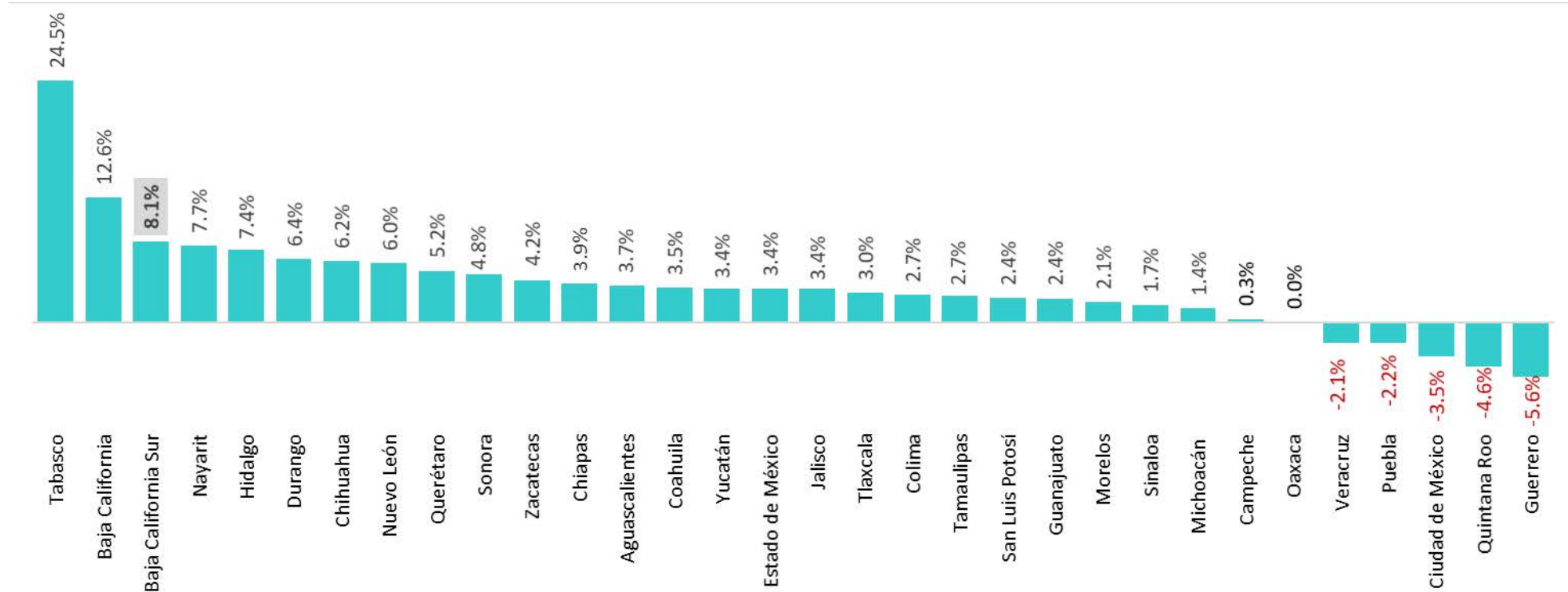


- Quintana Roo closes Nov-2021 with 442,048 jobs, 7.4% fewer than in Nov-2019.
- 76,265 more jobs were recorded from Dec-2020 to Nov-2021.

SOURCE: IMSS

# Effects on employment in Mexico

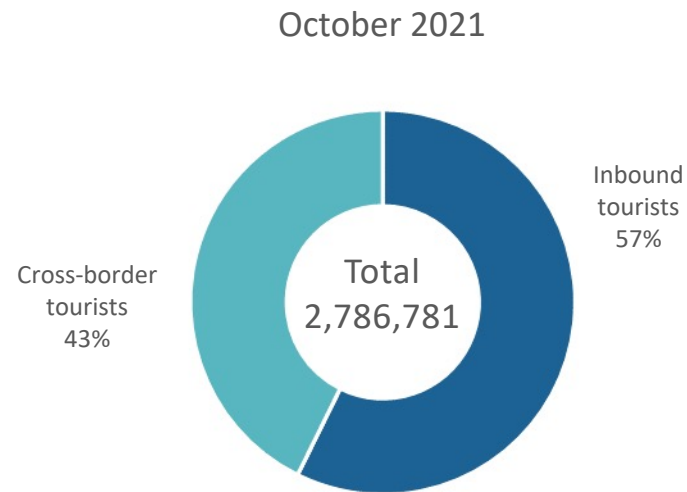
Employment variation by state (November 2021 vs. December 2019)



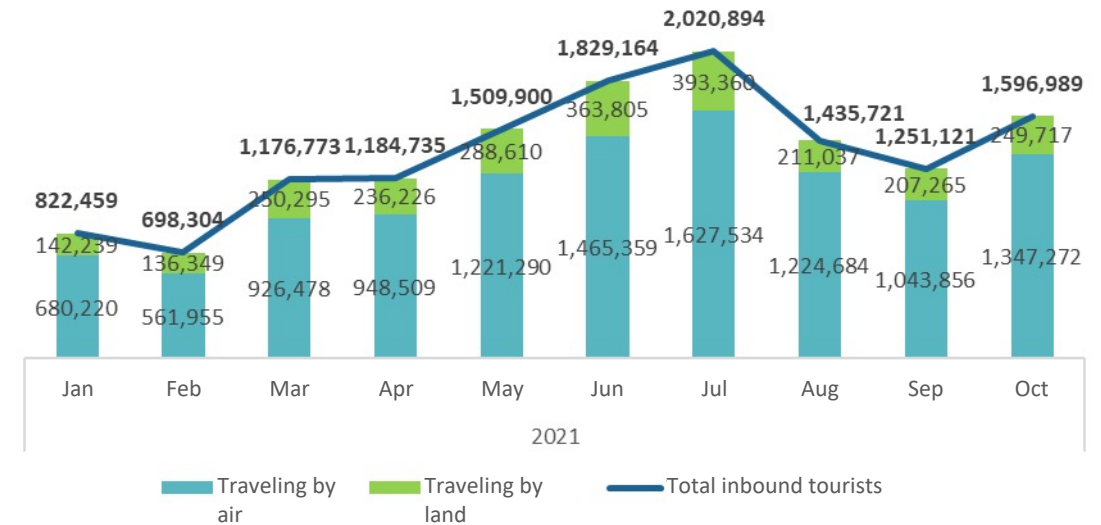
- For the fourth consecutive month, Baja California Sur continues to have a higher number of jobs than it did at the end of Dec-2019 (+8.1%). Quintana Roo recorded 4.6% fewer jobs.

SOURCE: IMSS

# International tourist arrivals in Mexico



- In Oct-2021, 2.79 million international tourists arrived in the country (23.2% fewer than in Oct-2019). 57% were inbound tourists.
- The average spending of inbound tourists arriving by air was USD 1,112 (\$188 more than the average spending in Oct-2019).



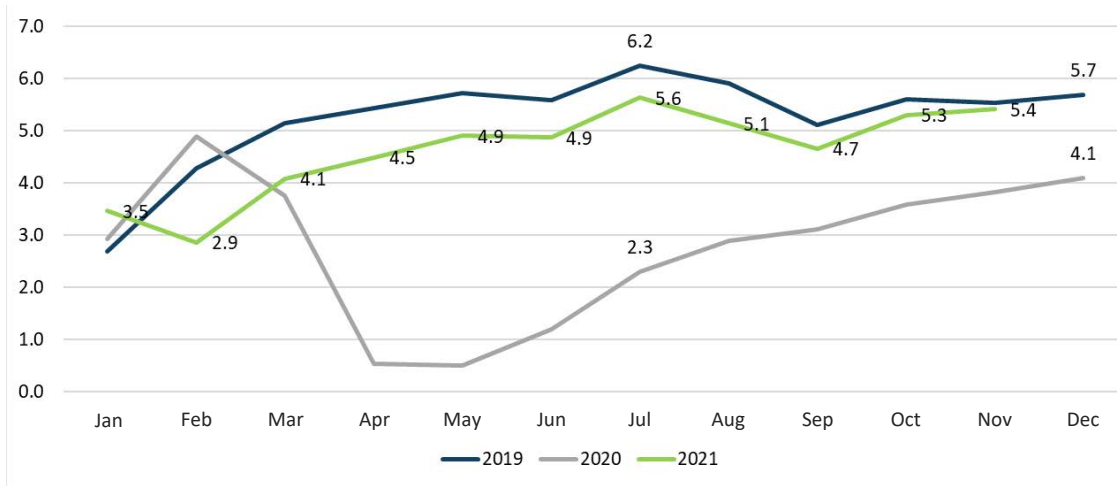
- In Oct-2021, the total number of inbound tourists increased by 27.6% compared to the previous month.
- There is a 2.2% drop in the total number of inbound tourists compared to Oct-2019.
- 84% arrived by air, and 16% did so by land.

SOURCE: INTERNATIONAL TOURIST SURVEYS, INEGI



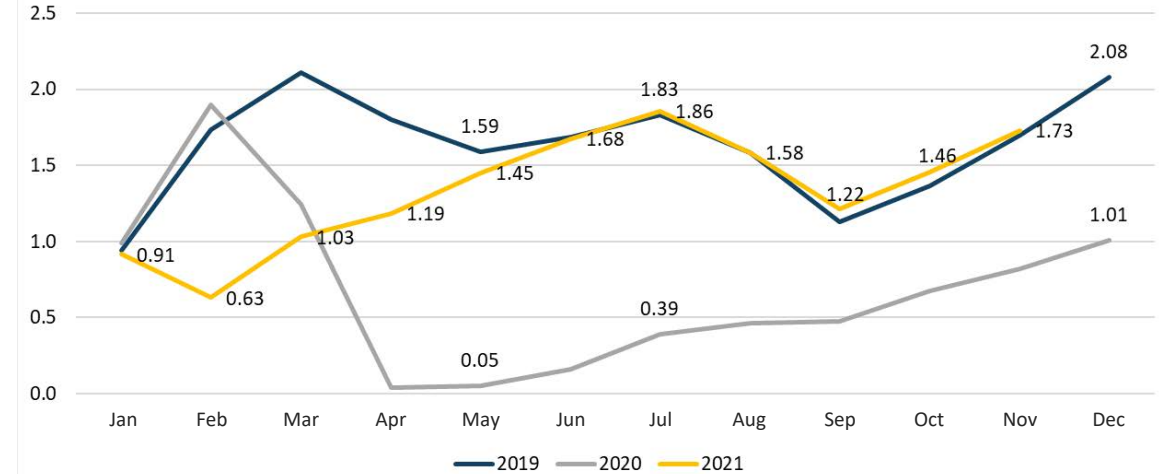
# Air traffic in Mexico - Airport groups

Passenger traffic in domestic flights (millions)



- The number of domestic passengers in Nov-2021 went up 2.1% compared to Oct-2021.
- Passenger traffic was 2.3% lower in Nov-2021 compared to Nov-2019.

Passenger traffic in international flights (millions)

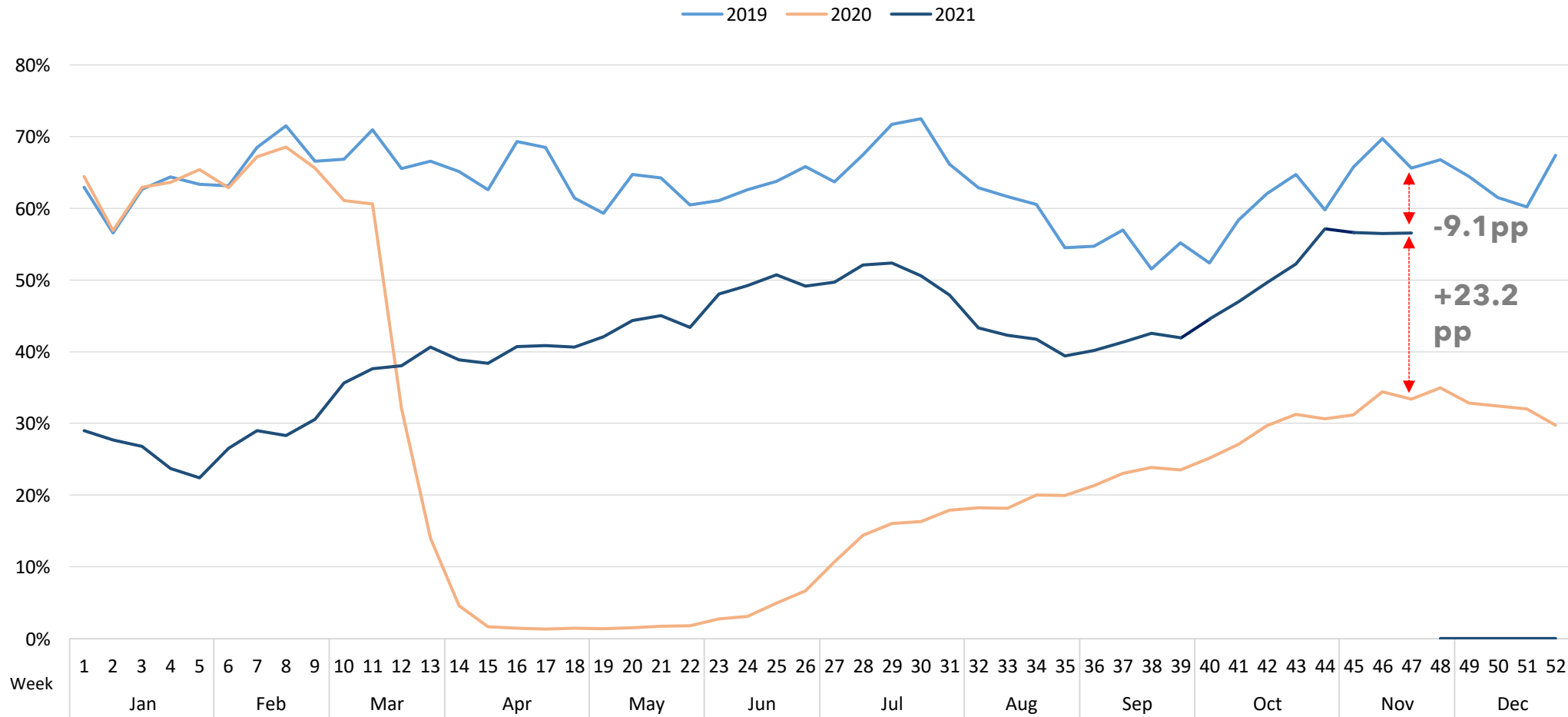


- The number of international arrivals in Nov-2021 went up 18.8% compared to Oct-2021.
- In Nov-2021, the number of international arrivals surpassed by 1.8% that of Nov-2019.

SOURCE: ASUR, OMA, GAP \*TOTAL INFORMATION FROM THE THREE AIRPORT GROUPS, CDMX'S INFORMATION NOT INCLUDED.

# Hotel indicators in Mexico

Hotel occupancy in Mexico (average of 12 destinations)

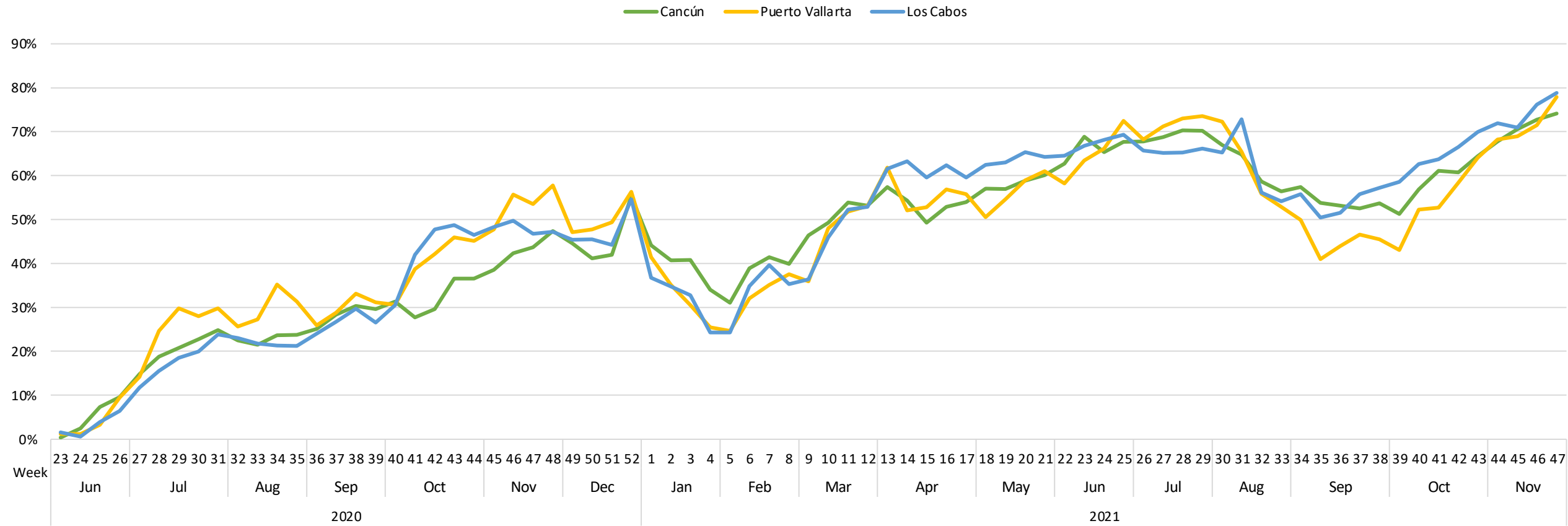


- Hotel occupancy started to pick up from week 41 onwards and remained close to 56% from week 44 to week 47.
- By the end of week 47, occupancy closed at 56.6%, down 9.1pp compared to the same week of 2019.

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

# Hotel indicators in Mexico

Hotel occupancy in Cancun, Puerto Vallarta, and Los Cabos



- As of week 37, Los Cabos has maintained a higher occupancy rate than Cancun and Puerto Vallarta.
- By the end of week 47, Los Cabos, Puerto Vallarta, and Cancun had an occupancy of 78.8%, 77.9%, and 74.1%.

SOURCE: DATATUR



## LOS CABOS TOURISM OBSERVATORY

### DEFINITIONS





# Definitions

---

- **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

---

- **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

All rights reserved. Total or partial reproduction is prohibited.



Developed by STA Consultants S.C.  
[www.staconsultores.com](http://www.staconsultores.com) | [info@staconsultores.com](mailto:info@staconsultores.com)