



# LOS CABOS TOURISM OBSERVATORY

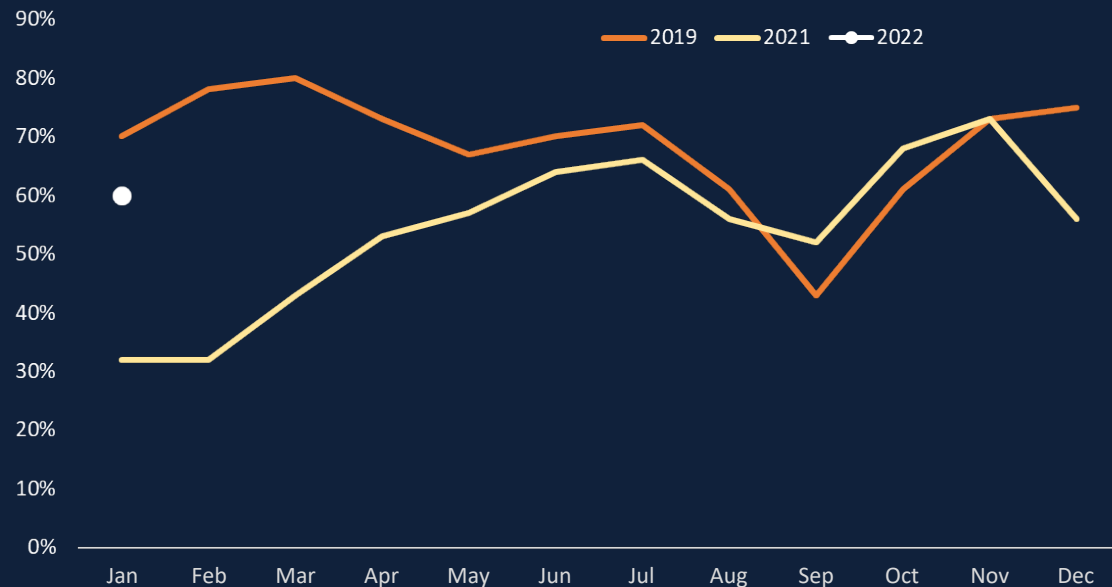
**KEY PERFORMANCE INDICATORS**

**FEBRUARY 2022**



# Leading indicators – Summary

## Hotel Occupancy:



## Air Passenger Arrivals

### Total Passengers

(Jan-2022, expressed in thousands):

**244.65**

**+6.3%**

(vs. Jan-2019)

### National Passengers

(Jan-2022, expressed in thousands):

**82.25**

**+26.8%**

(vs. Jan-2019)

### International Passengers

(Jan-2022, expressed in thousands):

**159.4**

**-2.1%**

(vs. Jan-2019)

SOURCE: GAP

## Other indicators

### Cruise Ships

(Dec-2021):

**30**

**-2 vessels**

(vs. Dec-2019)

SOURCE: DATATUR

### Cruise Passengers

(Dec-2021):

**50,198**

**-38%**

(vs. Dec-2019)

SOURCE: DATATUR

### Group Business Total

RFPs (Jan-2022):

**45**

**+11 RFPs**

(vs. Jan-2020)

SOURCE: CVENT

### Hotel Occupancy

(Jan-2022):

**60%**

**-10pp**

(vs. Jan-2019)

SOURCE: AHLC

### Rooms Available

(Dec-2021):

**22,198**

**+0.3%**

(vs. Dec-2019)

SOURCE: DATATUR

### Room Nights

(Dec-2021):

**1,222,299**

**+2%**

(vs. Dec-2019)

SOURCE: DATATUR

### Tourist Satisfaction:

More than expected

(Jan-2022):

**67%**

**+27.3pp**

(vs. Jan-2019)

SOURCE: TOURIST SURVEYS

### Attendees to Congresses and Conventions

(Jan-2022):

**0.8%**

**-0.2pp**

(vs. Jan-2019)

SOURCE: TOURIST SURVEYS

### Tourists' Origin

(Jan-2022):

**64% foreigners**

**-7pp**

(vs. Jan-2019)

SOURCE: TOURIST SURVEYS

# Leading indicators – Summary

## PASSENGER ARRIVALS

- In Jan-2022, Los Cabos International Airport recorded a 6.3% (+14.6 thousand) increase in the total number of passengers arriving at the destination compared to Jan-2019, adding up to a total of 244.65 thousand (when considering arrivals only).
  - Passengers on domestic flights (82.5 thousand) represent 34.8% of total arrivals, increasing by 26.8% (+18 thousand) compared to Jan-2019.
  - Passengers on international flights (159.4 thousand) represent 65.2% of total arrivals, decreasing by 2.2% (-3.4 thousand) compared to Jan-2019.

## FLIGHT SCHEDULES

- The domestic market has 48.5% more available seats scheduled from Feb-2022 to Jul-2022 (compared to the same period in 2019). 37.4% more seats are expected in Feb-2022.
  - Flight seats departing from CDMX, MTY, and TIJ increased by 36%, 100.3%, and 232%, respectively (compared to 2019); however, BJJ decreased by 47%.
- There are 1.3 million seats scheduled for the U.S. in the next six months, which is 31.6% more than the same period in 2019.
  - LAX (+21.5%), PHX (+42.2%), HOU (+23.7%), DFW (+33.4%), DEN (+51.5%), and SEA (+138.6%) had the most significant increase vs. 2019. However, San Diego showed a decrease of 9.7%.

- For Feb-2022, the United States expects 32.3% more available seats than those scheduled for 2019.
- From Canada, 21.2% fewer seats are expected in the next six months, with a 29.8% drop in Feb-2022.
  - Decreases are expected in Calgary (-38.1%), Edmonton (-20.4%), and Toronto (-20.6%) within the next six months. Vancouver showed an increase of 31.6% compared with 2019.

## HOTEL PERFORMANCE

- Occupancy in Jan-2022 was at 60%, down 10pp compared to Jan-2019.
  - Occupancy in Cabo San Lucas decreased by 13pp compared to Jan-2019 and is now at 64%.
  - San Jose del Cabo recorded an occupancy rate of 53% (18pp lower than in Jan-2019).
  - Los Cabos Corridor recorded an occupancy rate of 54% (a 3pp increase compared to Jan-2019).
- In Dec-2021, the number of rooms available in Los Cabos increased by 0.3% compared to Dec-2019, reaching 22,198 this month.

- Hotels in Los Cabos recorded 251 thousand tourist arrivals in Dec-2021, equivalent to an increase of 4.2% compared to Dec-2019.
- Domestic tourism dropped by 13.5% (-8.7 thousand), while international tourism increased by 10.7% (+18.9 thousand).
- There were 1.22 million occupied room nights in Dec-2021, 2% more than in Dec-2019.

## TOURIST SURVEYS

- In Jan-2022, 67% of tourists rated their experience in Los Cabos as 'better than expected' (27,3pp more compared to Jan-2019, and 3pp more than in Dec-2021).
- During Jan-2022, security was perceived as 'bad' or 'regular' by 0.9% of tourists, 11.1pp better than in Jan-2019.
- Satisfaction with the airport also improved by 4.2pp compared to 2019 (2.8% of tourists rated their experience as 'bad' or 'regular'); however, it is 0.2pp lower compared to Dec-2021.
- The number of repeat tourists decreased by 6.4pp compared to 2019, reaching 41% in Jan-2022.
- 27% of tourists traveled with a package tour, down 13.9pp compared to 2019.
- The number of tourists who visited restaurants decreased by 3.2pp this month, recording 85%.





## LOS CABOS TOURISM OBSERVATORY

**PASSENGER ARRIVALS**

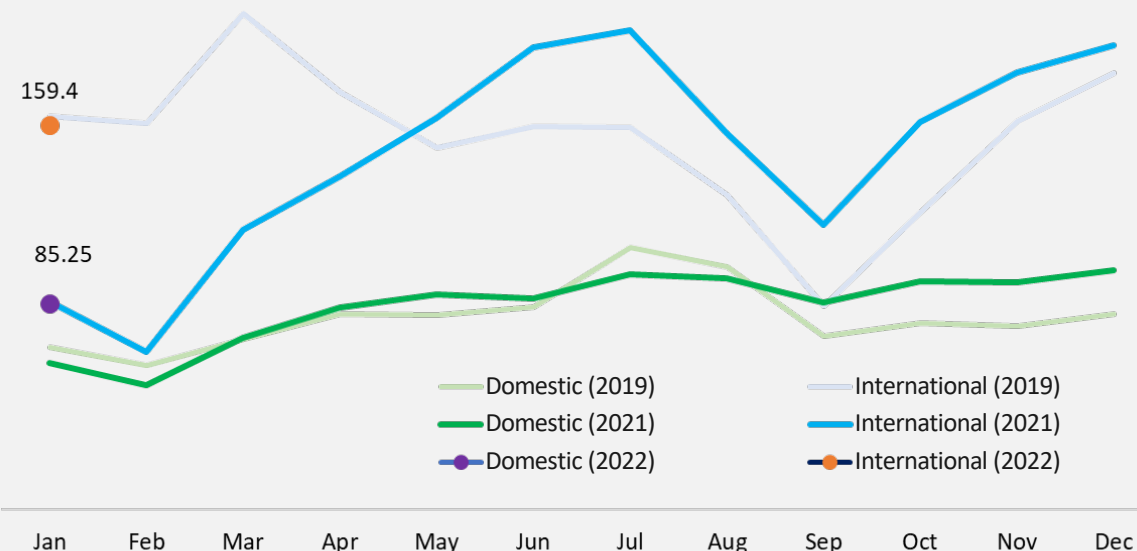


# Passenger arrivals at Los Cabos International Airport, 2019-2022

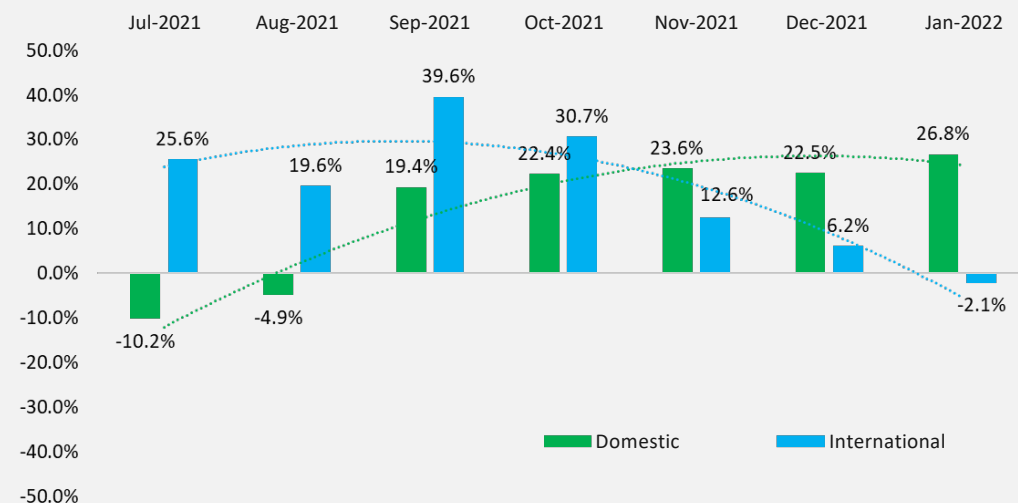
- In Jan-2022, 244.65 thousand passengers arrived at Los Cabos International Airport, representing an **increase** of 6.3% compared to the same period in 2019.
- It also represents an average growth rate of 4.3% between Jan-2021 and Jan-2022.
- Passengers on domestic flights (**82.25 thousand**) accounted for 34.8% of total arrivals and increased by 26.8% compared to Jan-2019.
  - TMAC: 2% (between Jan-2021 and Jan-2022).
- Passengers on international flights (**159.4 thousand**) accounted for 65.2% of total arrivals and decreased by 2.1%.
  - TMAC: -0.2% (between Jan-2021 and Jan-2022).

SOURCE: GAP

Monthly arrivals (expressed in thousands)



Variation with respect to 2019







## LOS CABOS TOURISM OBSERVATORY

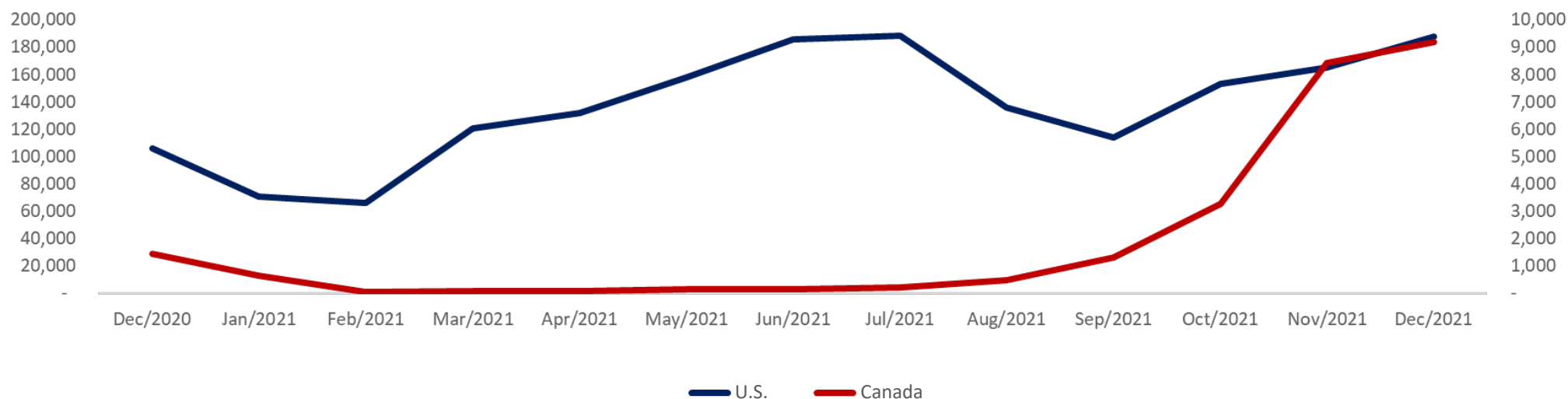
**PASSENGER ARRIVALS**  
**by nationality**



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

Regions	Dec/2020	Jan/2021	Feb/2021	Mar/2021	Apr/2021	May/2021	Jun/2021	Jul/2021	Aug/2021	Sep/2021	Oct/2021	Nov/2021	Dec/2021	ΔDec-21 / Dec-19	Δ Jan-Dec 21 / Jan-Dec 19
U.S.	105,991	70,454	66,275	120,361	131,784	157,649	185,830	188,099	135,769	114,095	153,027	165,218	187,942	16.6%	5.4%
Canada	1,429	628	44	75	66	144	144	211	480	1,316	3,280	8,420	9,190	-57.3%	-84.8%
Europe	64	32	32	39	37	61	55	136	98	62	94	299	431	-64.4%	-87.1%
Caribbean, Central & South America	43	19	18	31	24	58	76	138	138	107	130	116	155	4.7%	-55.4%
Rest of the world	67	12	11	38	24	48	90	163	169	108	187	352	337	-62.5%	-85.2%
Grand total	107,594	71,145	66,380	120,544	131,935	157,960	186,195	188,747	136,654	115,688	156,718	174,405	198,055	7.1%	-3.8%

Key markets	Dec/2020	Jan/2021	Feb/2021	Mar/2021	Apr/2021	May/2021	Jun/2021	Jul/2021	Aug/2021	Sep/2021	Oct/2021	Nov/2021	Dec/2021	ΔDec-21 / Dec-19	Δ Jan-Dec 21 / Jan-Dec 19
United Kingdom	18	5	16	16	8	25	15	50	48	7	27	81	146	-81.1%	-91.6%
Australia	19	3	1	4	4	4	12	18	21	15	19	41	44	-85.6%	-96.2%
South Korea	3	-	-	10	1	5	6	17	16	10	11	45	15	-88.1%	-91.3%
Key markets total	40	8	17	30	13	34	33	85	85	32	57	167	205	-83.0%	-93.5%



SOURCE: INM-SIOM

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

**+7.1%**

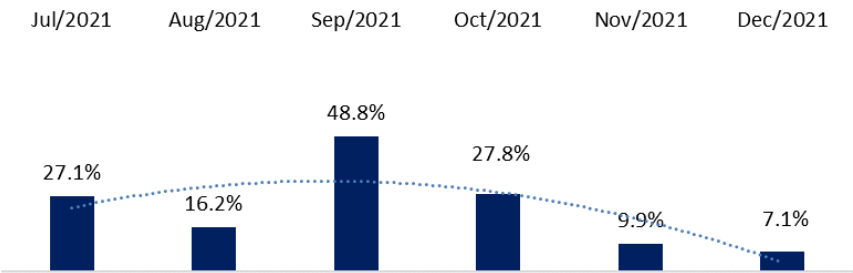
Dec-2021 vs. Dec-2019

In Dec-2021, Los Cabos International Airport recorded the arrival of 198,055 international tourists, up 7.1% compared to Dec-2019.

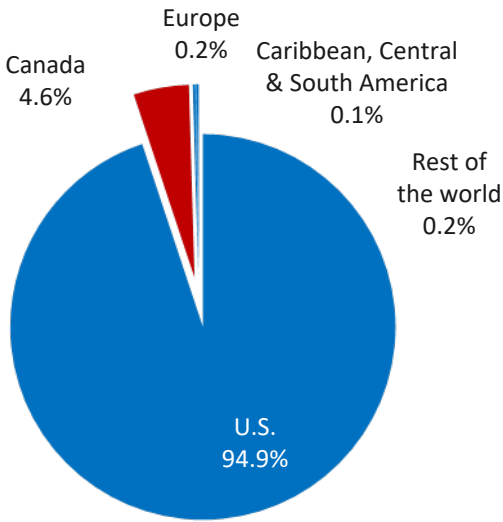
However, this growth is mainly due to a 16.6% increase in U.S. inbound tourists. Meanwhile, the rest of the regions declined except for the Caribbean, Central, and South America.

American tourists represent 94.9% of the total.

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



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



SOURCE: INM-SIOM



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

Regions	National			Los Cabos		
	Jan-Dec-2019	Jan-Dec-2021	Δ 2021/2019	Jan-Dec-2019	Jan-Dec-2021	Δ 2021/2019
U.S.	10,789,135	10,465,018	-3.0%	1,590,530	1,676,503	5.4%
Canada	2,296,061	461,051	-79.9%	158,138	23,998	-84.8%
Europe	1,963,049	860,322	-56.2%	10,690	1,376	-87.1%
Caribbean, Central & South America	2,685,601	1,579,836	-41.2%	2,265	1,010	-55.4%
Rest of the world	730,963	358,688	-50.9%	10,369	1,539	-85.2%
<b>Grand total</b>	<b>18,464,809</b>	<b>13,724,915</b>	<b>-25.7%</b>	<b>1,771,992</b>	<b>1,704,426</b>	<b>-3.8%</b>

Key markets	National			Los Cabos		
	Jan-Dec-2019	Jan-Dec-2021	Δ 2021/2019	Jan-Dec-2019	Jan-Dec-2021	Δ 2021/2019
United Kingdom	559,037	105,141	-81.2%	3,559	298	-81.1%
Australia	64,809	5,281	-91.9%	3,738	142	-85.6%
South Korea	86,398	12,729	-85.3%	1,385	121	-88.1%
<b>Key markets total</b>	<b>710,244</b>	<b>123,151</b>	<b>-82.7%</b>	<b>2,242</b>	<b>561</b>	<b>-83.0%</b>



When comparing Jan-Dec-2021 to 2019, international tourist arrivals by air decreased 25.7% nationwide and 3.8% in Los Cabos.

- On a national level, the U.S. travel market decreased by 3%, whereas the Canadian travel market did so by 79.9%.
- In Los Cabos International Airport, the U.S. travel market grew by 5.4%, while the Canadian travel market decreased by 84.8% when comparing both periods.

SOURCE: INM-SIOM



## LOS CABOS TOURISM OBSERVATORY

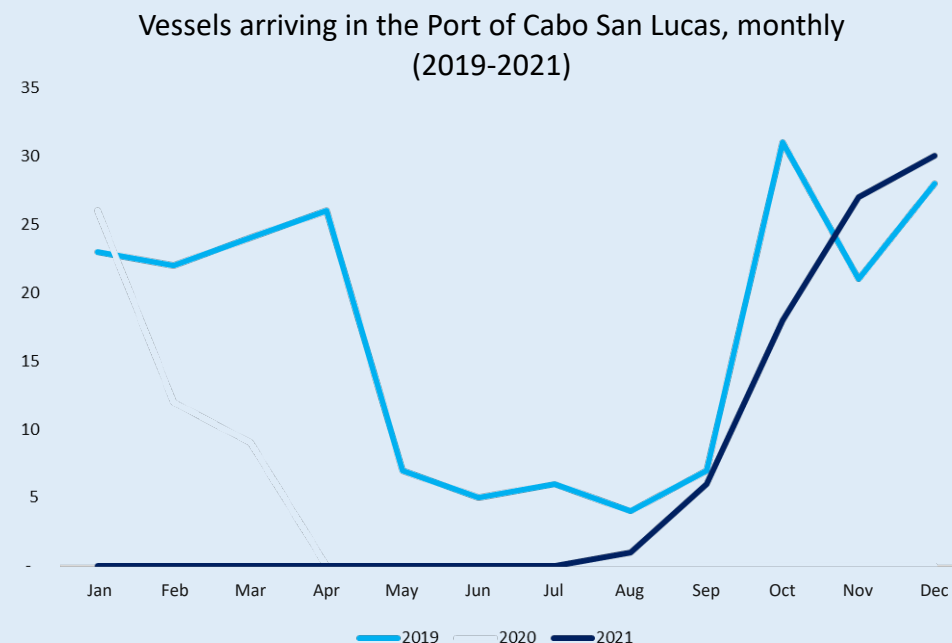
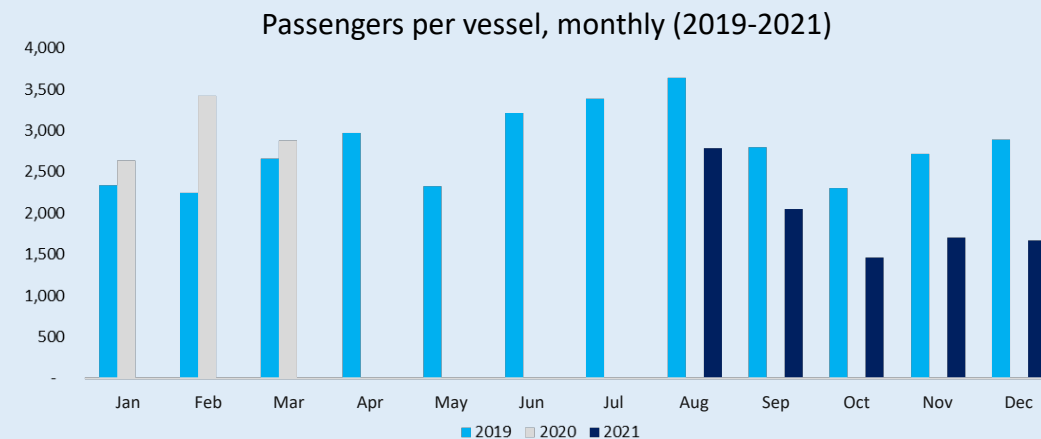
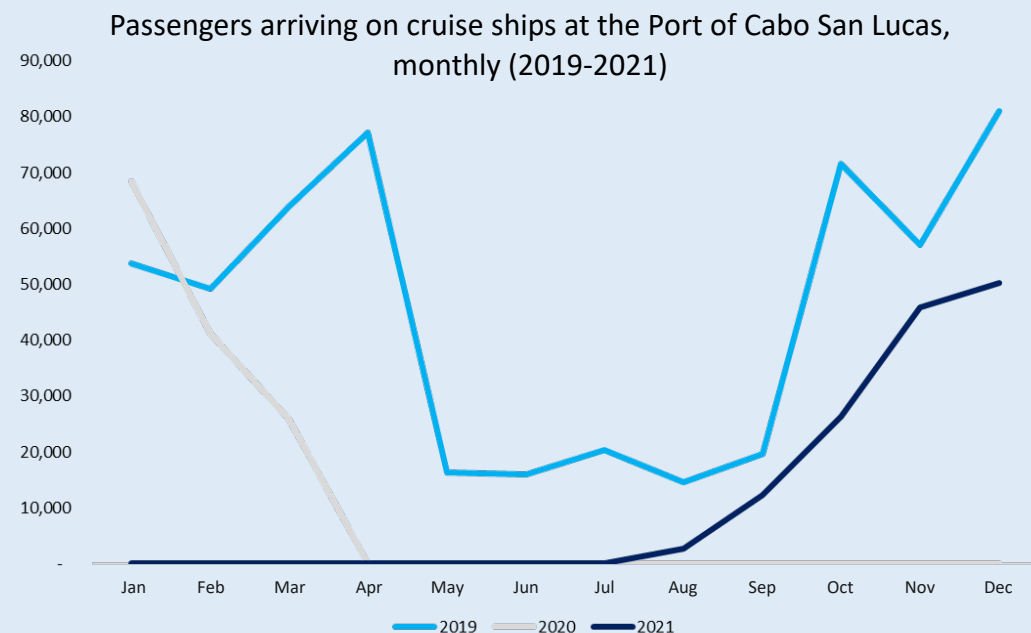
**YACHT AND CRUISE SHIP ACTIVITY**



# Cruise activity (Dec-2021)

Cruise operations continued to improve significantly in Dec-2021, with **30 vessels** arriving at the port of Cabo San Lucas carrying a **total of 50,198 passengers**. However, this represents a decrease of 38% compared to Dec-2019 (a record month for cruise passenger arrivals).

SOURCE: DATATUR-SCT



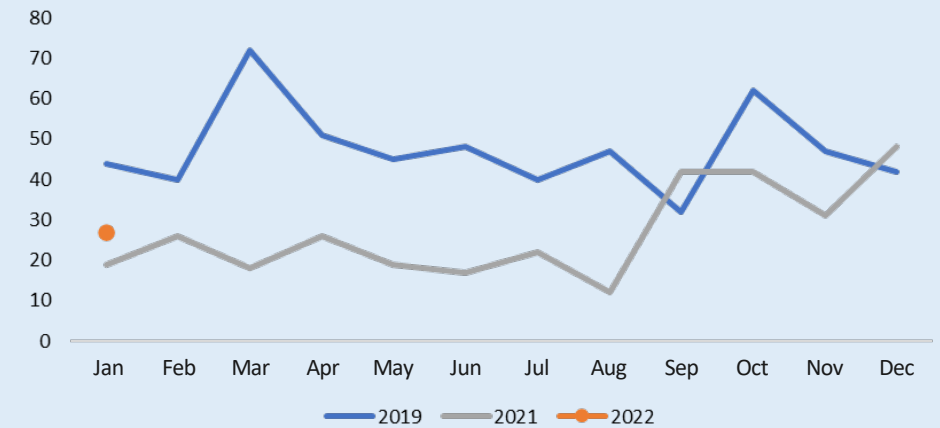


# Yacht arrivals at the Port of Cabo San Lucas (Jan-2022)

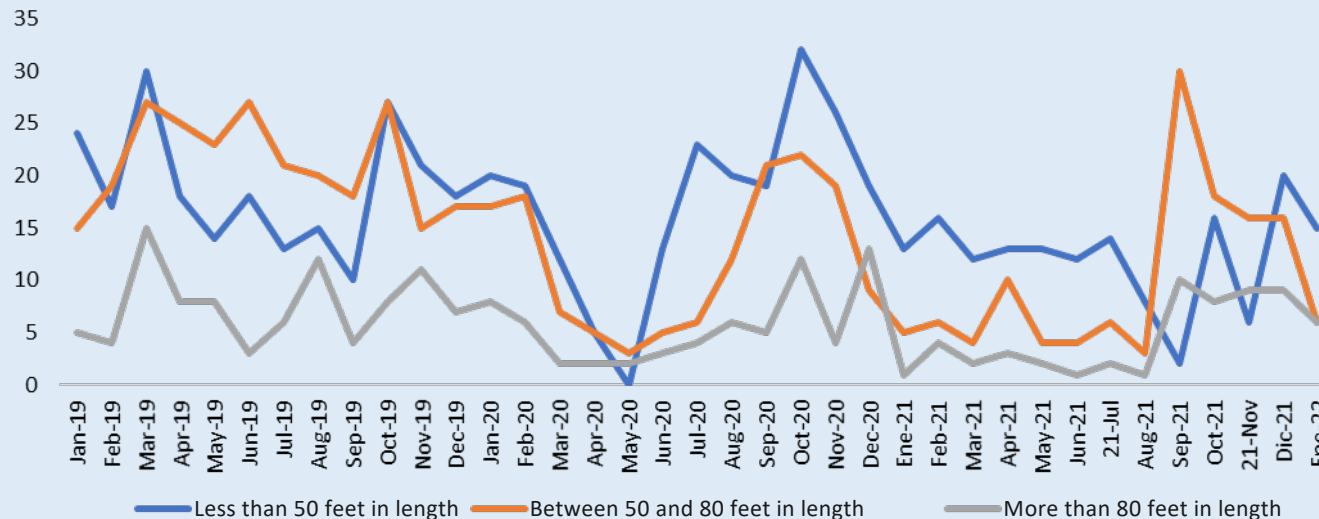
- 27 yachts arrived at the Port of Cabo San Lucas in Jan-2022. This represents a decrease of 39% compared to the same period in 2019.
- 56% were small-sized vessels that measured less than 50 feet in length.

SOURCE: API CABO SAN LUCAS

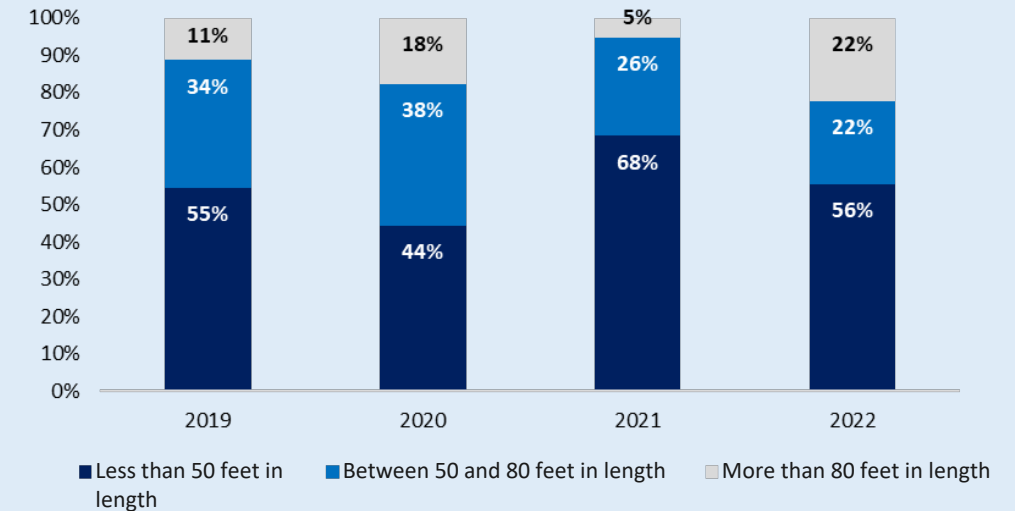
Total yacht arrivals, monthly (2019-2022)



Monthly evolution, by vessel size (2019-2022)



Arrivals distribution, by vessel size (January)





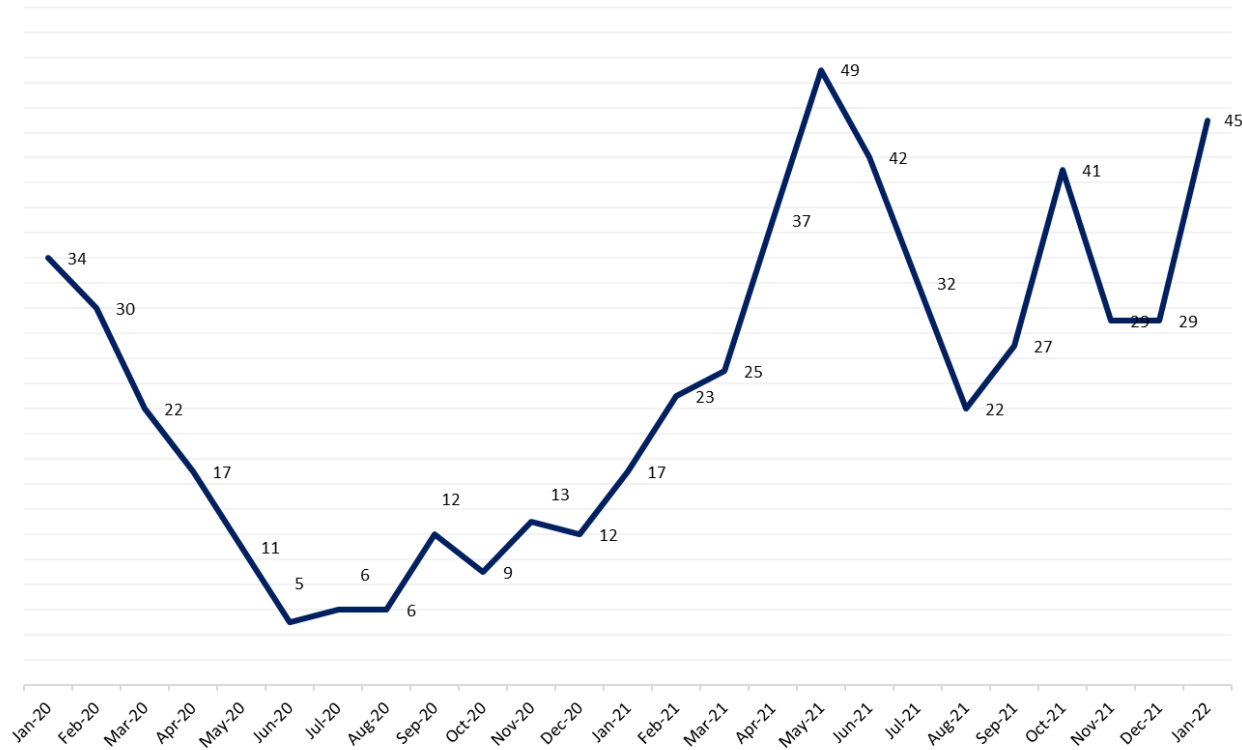
## LOS CABOS TOURISM OBSERVATORY

**TOURIST SURVEYS & GROUP BUSINESS**



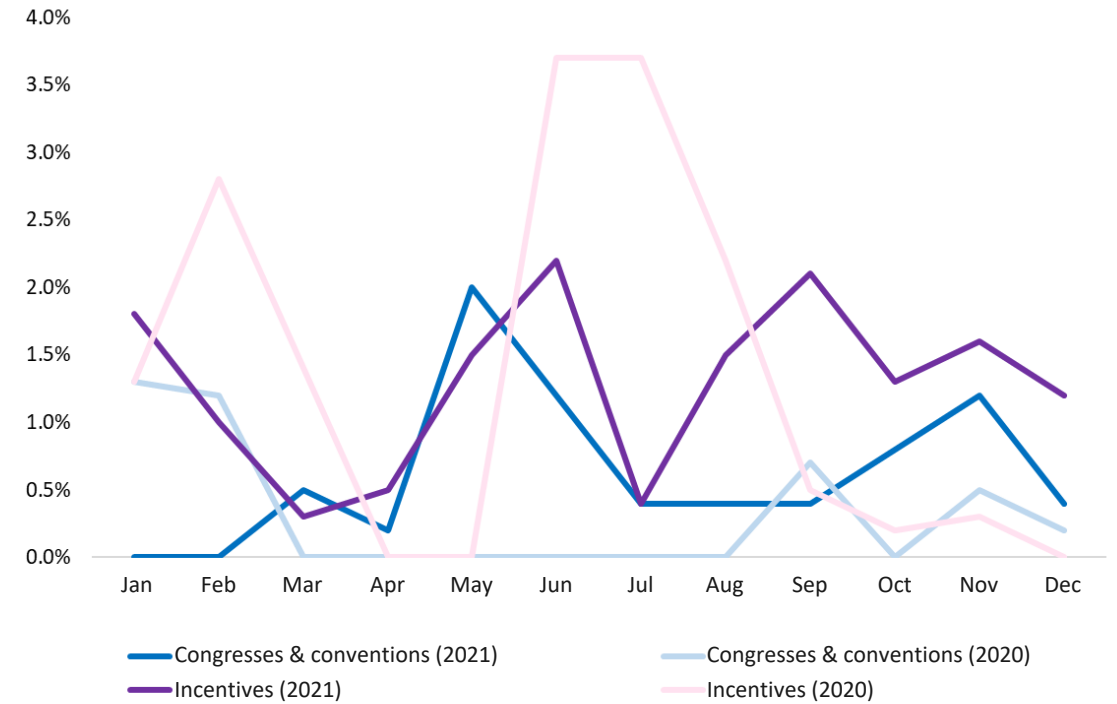
# Group Business

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



SOURCE: CVENT

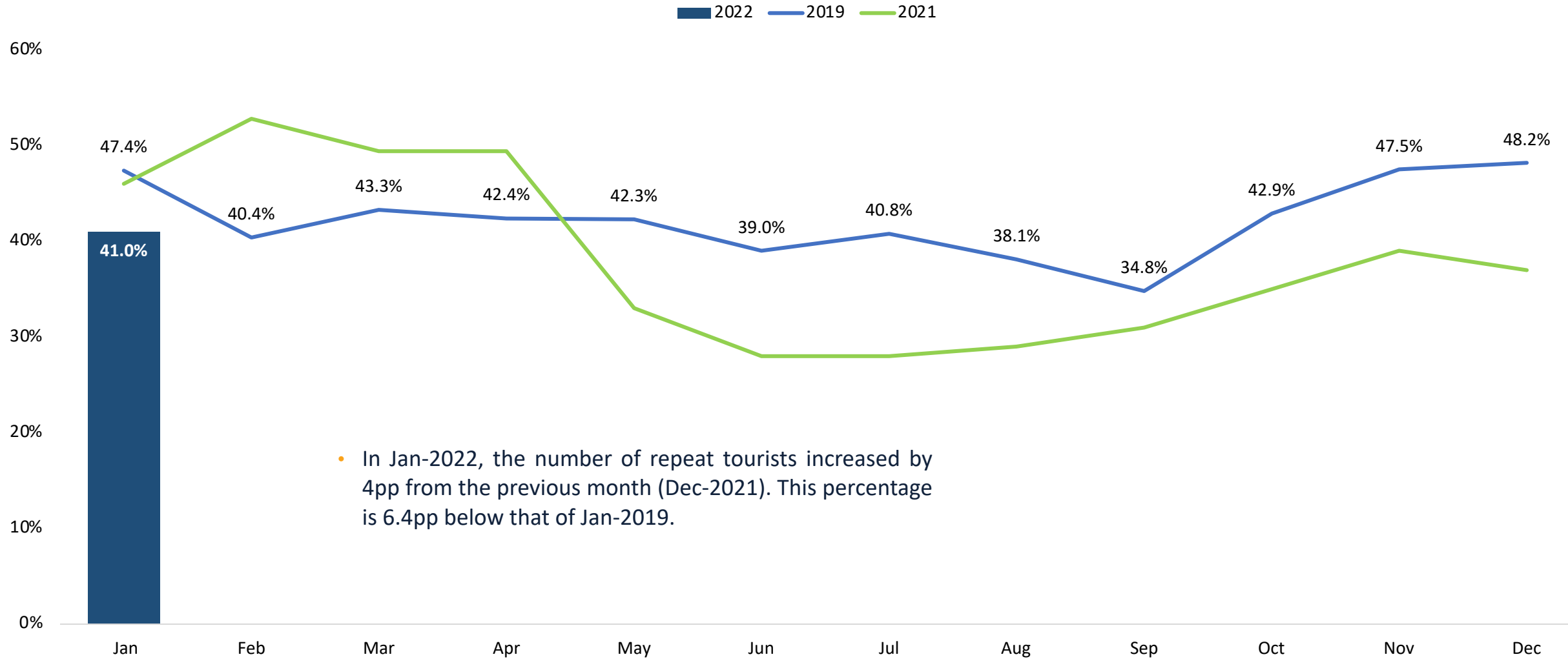
Attendees to congresses, conventions and incentive trips (% of total tourists)



SOURCE: TOURIST SURVEYS

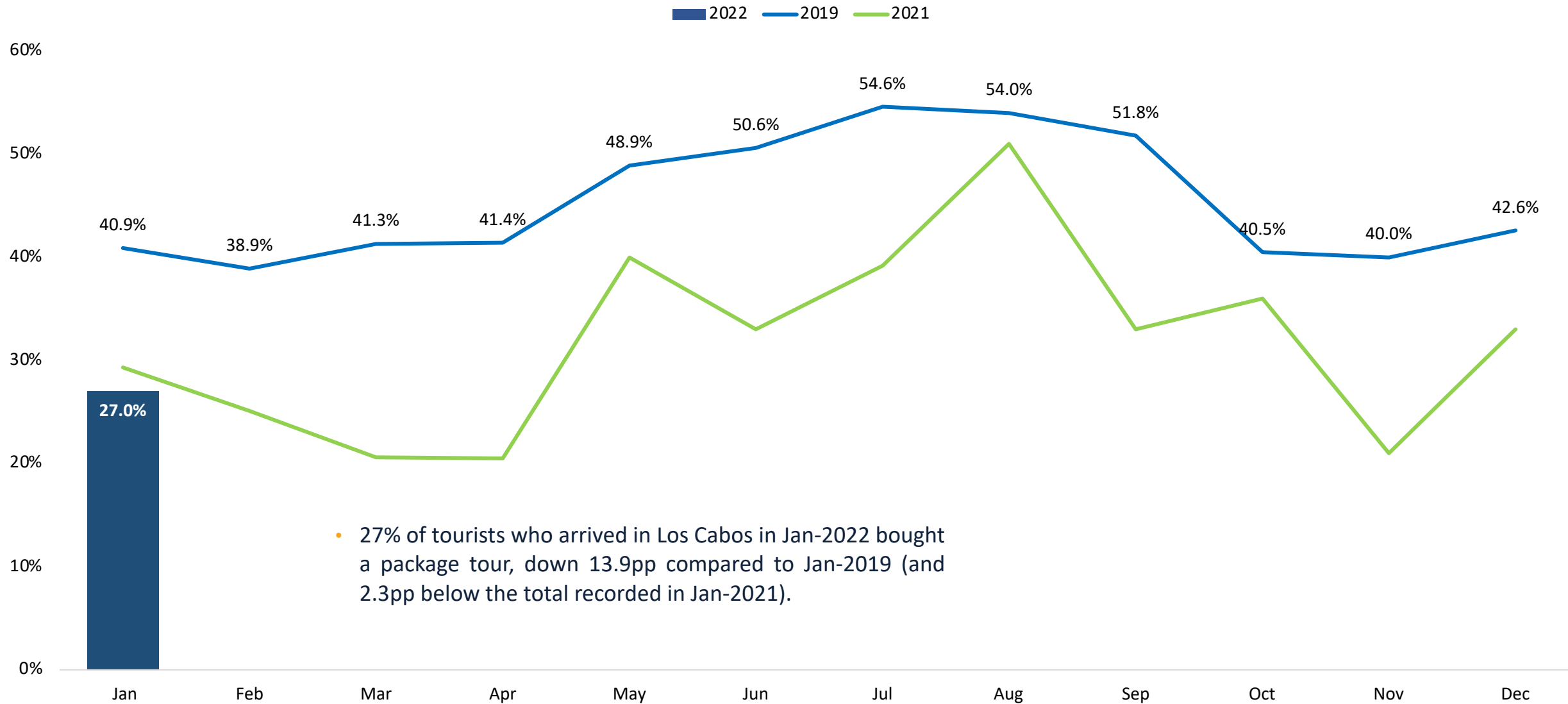


# Return rate to the destination



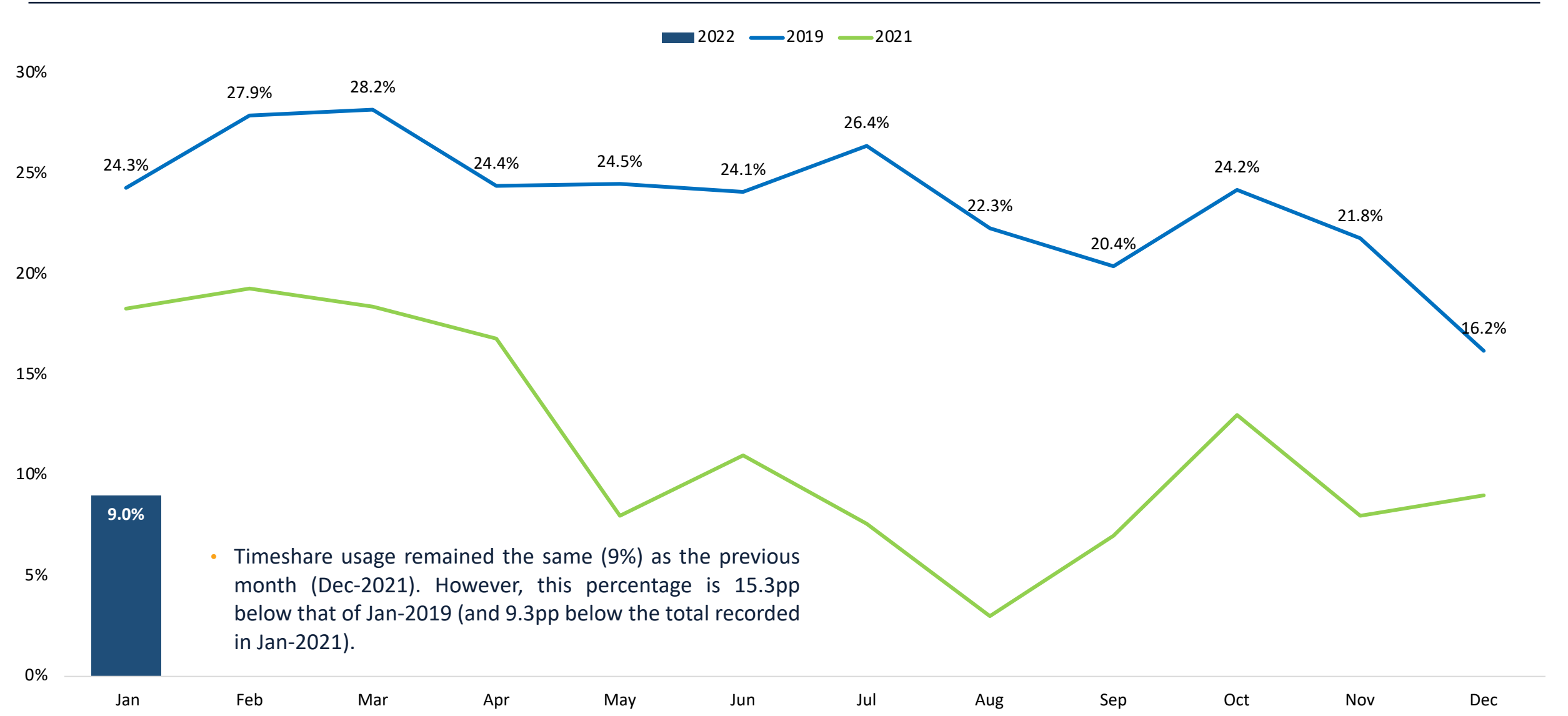
SOURCE: TOURIST SURVEYS

# Package tour purchases



SOURCE: TOURIST SURVEYS

# Timeshares



SOURCE: TOURIST SURVEYS





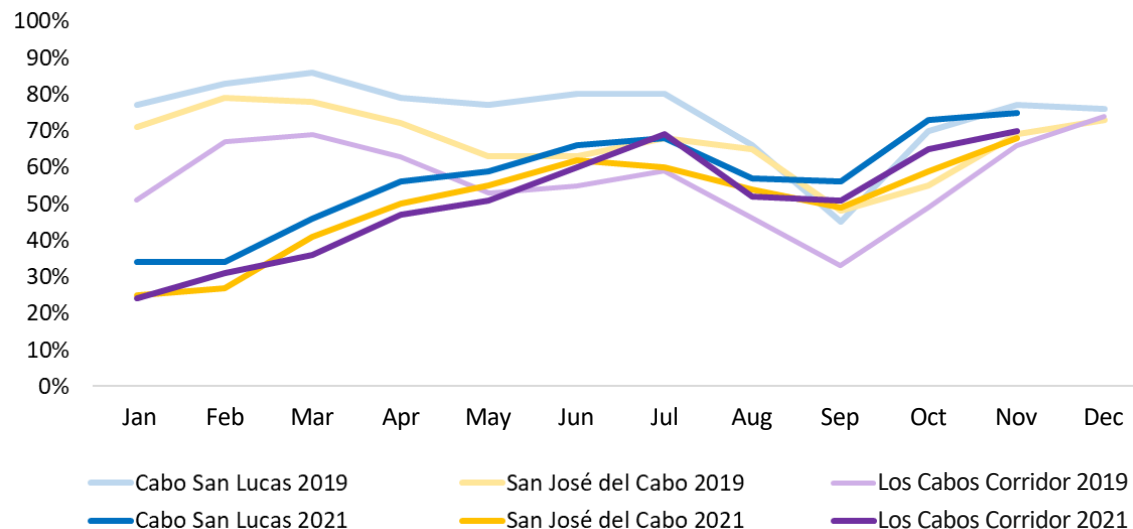
## LOS CABOS TOURISM OBSERVATORY

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



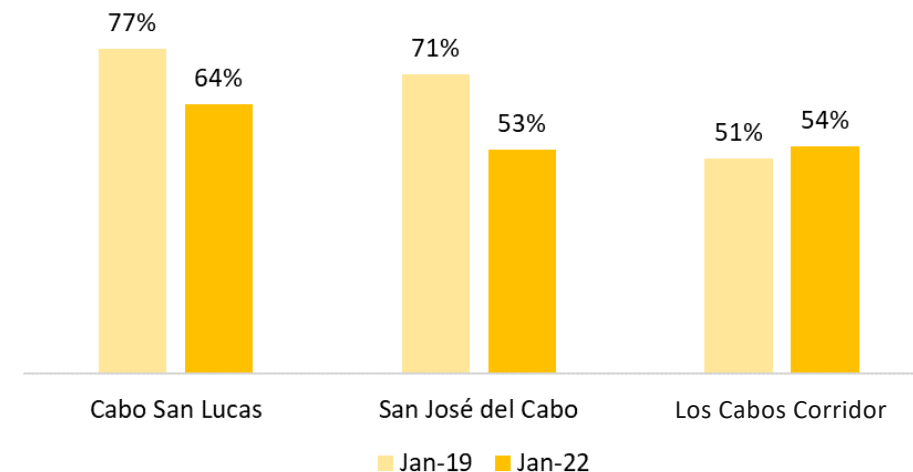
# Evolution of the hotel supply in Los Cabos and sub-destinations

Monthly hotel occupancy (2019-2021)



SOURCE: AHLIC

Hotel occupancy, current month (2019-2022)

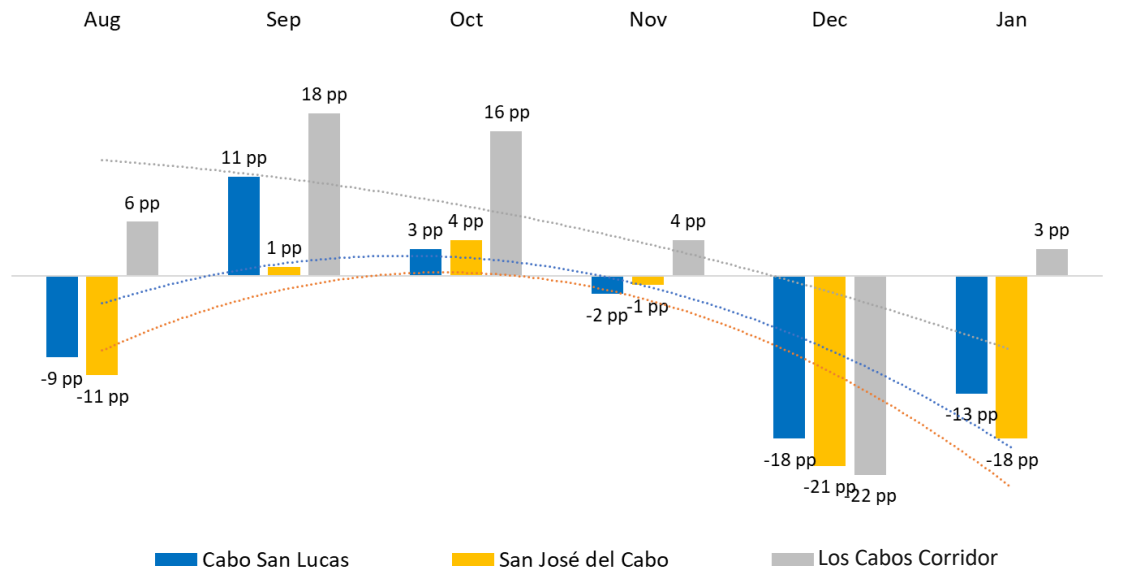


SOURCE: AHLIC

- According to the Los Cabos Hotel Association, hotel occupancy in Los Cabos reached 60% during Jan-2022, down 10pp compared to 2019. On a sub-destination level, hotel occupancy was at 64% in Cabo San Lucas (-13pp compared to 2019), 53% in San Jose del Cabo (-18pp), and 54% in Los Cabos Corridor (+3pp).
- In Dec-2021, 251,150 tourists arrived at hotels in Los Cabos, 4.2% more than in Dec-2019. Meanwhile, the average stay decreased by 0.1 nights (4.87, according to DataTur).
  - Domestic tourist arrivals at hotels decreased by 13.5% in this period, while international tourism grew by 10.7%.
  - In Dec-2021, domestic tourism represented 22.4% of the total. A share of 26.9% was recorded in 2019.

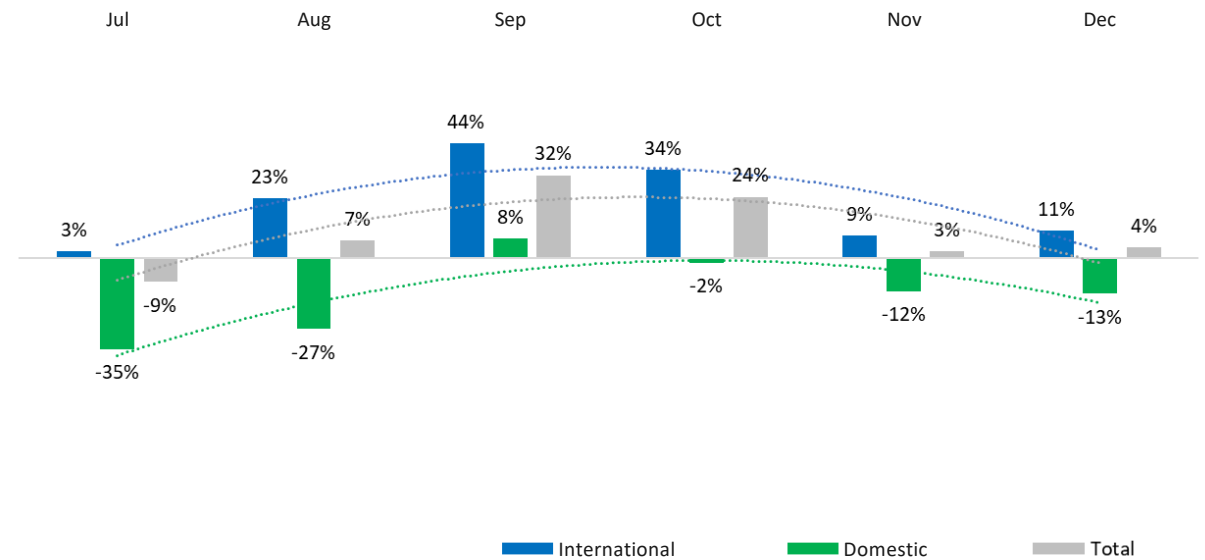
# Evolution of the hotel supply in Los Cabos and sub-destinations

Annual variation in hotel occupancy, by destination  
(from Aug-2021 to Jan-2022 vs. 2019)



SOURCE: AHLIC

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

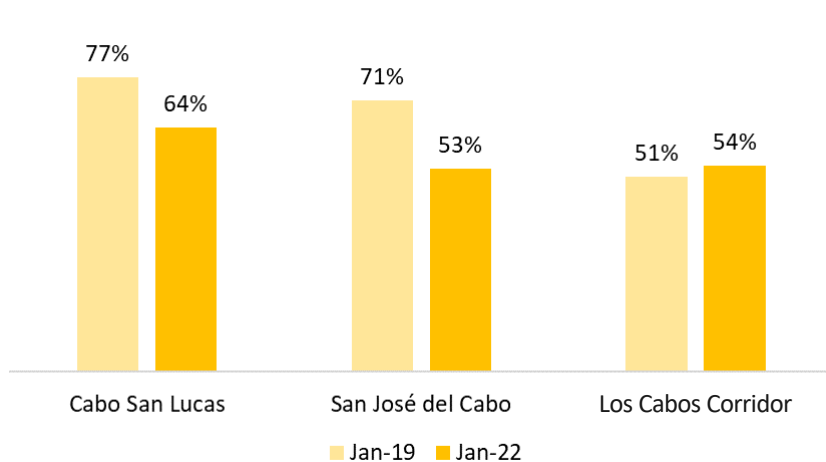


SOURCE: DATATUR

- Compared to Jan-2019, hotel occupancy in Cabo San Lucas and San Jose del Cabo decreased by 13pp and 18pp, respectively.
- However, Los Cabos Corridor showed a 3pp increase compared to 2019.

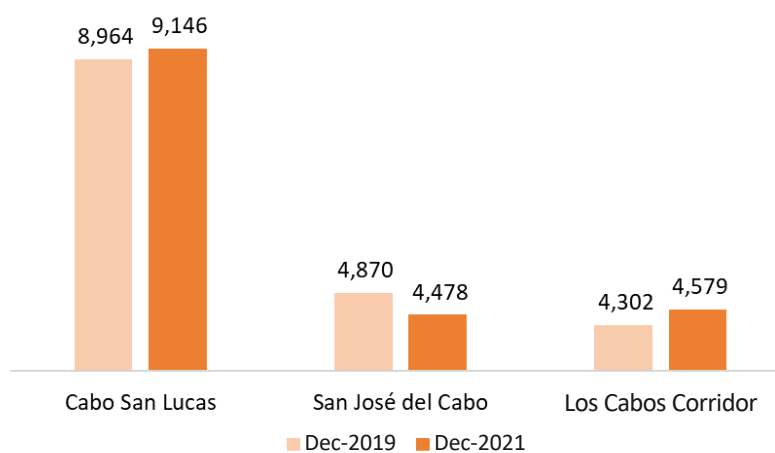
# Evolution of the hotel supply in Los Cabos and sub-destinations

Hotel occupancy (January 2019-2022)



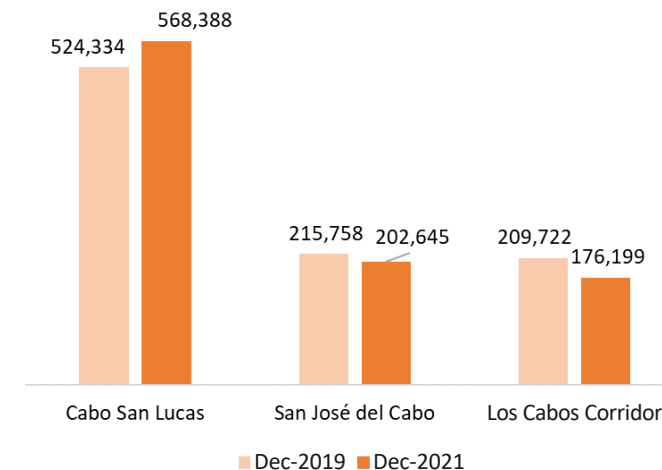
SOURCE: AHLC

Rooms available (December 2019-2021)



SOURCE: DATATUR

Room nights (December 2019-2021)



SOURCE: DATATUR

## CABO SAN LUCAS

- Hotel occupancy was 64%, down 13pp when comparing Jan-2022 to Jan-2019 (AHLC).
- Its hotel supply increased 2% between Dec-2019 and Dec-2021, registering a total of 9.1 thousand rooms (DataTur).
- Occupied room nights **increased 8.4%** between Dec-2019 and Dec-2021 (DataTur).

## SAN JOSE DEL CABO

- Occupancy was 53%, down 18pp when comparing Jan-2022 to Jan-2019 (AHLC).
- Its hotel supply decreased 8% between Dec-2019 and Dec-2021, registering a total of 4.5 thousand rooms (DataTur).
- Occupied room nights decreased 6.1% between Dec-2019 and Dec-2021 (DataTur).

## LOS CABOS CORRIDOR

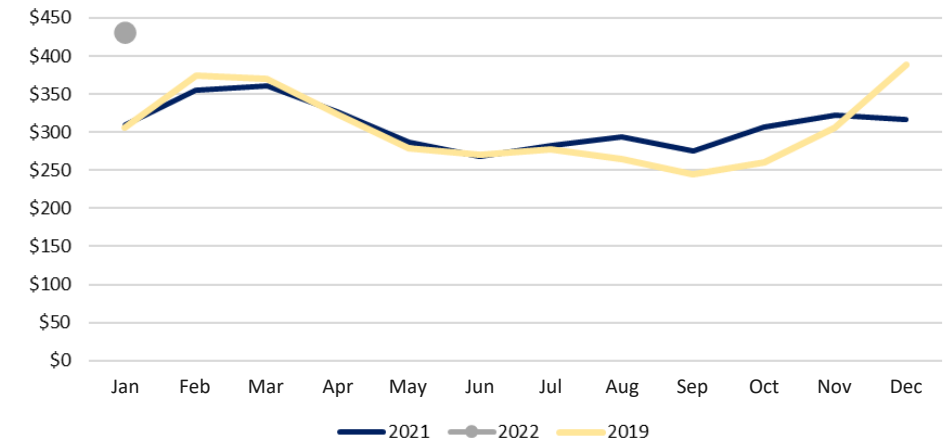
- Occupancy was 54% in Jan-2022, up 3pp compared to Jan-2019 (AHLC).
- Its hotel supply increased 6.4% between Dec-2019 and Dec-2021, registering a total of 4.6 thousand rooms (DataTur).
- Occupied room nights decreased 16% between Dec-2019 and Dec-2021 (DataTur).



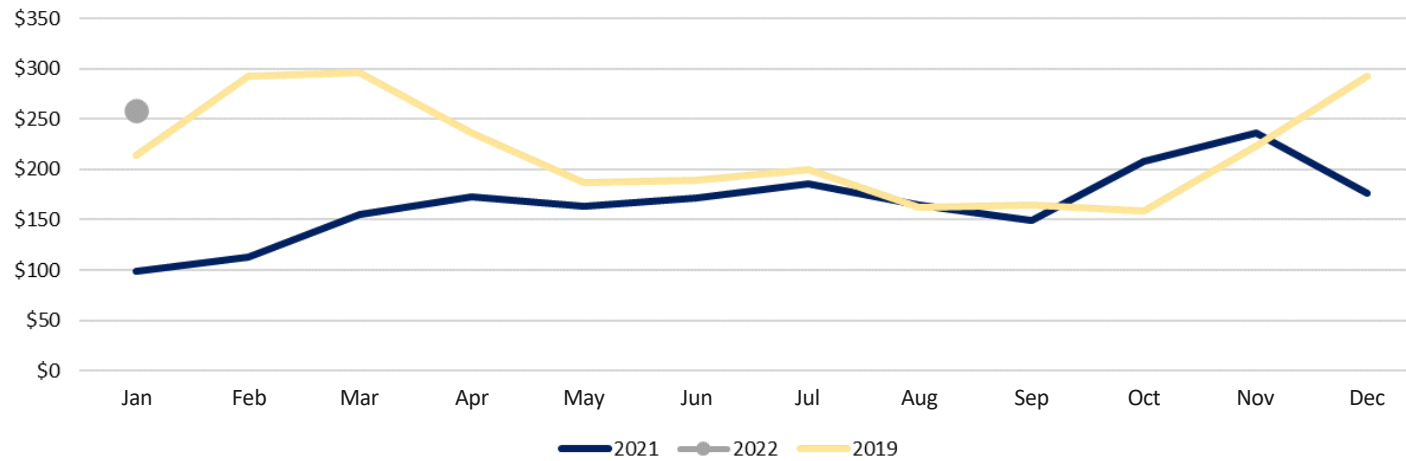
# Evolution of the RevPAR and the average hotel rate in Los Cabos & sub-destinations

- The average hotel rate in Los Cabos for Jan-2022 was USD 431, 112 dollars above the last 12-month average (\$319) and 72 dollars above that of Jan-2019.
  - Cabo San Lucas recorded an **increase of 39.2% (USD 80)** compared to 2019 and now stands at USD 284.
  - San Jose del Cabo **increased its rate by 28.1% (USD 68)** and now stands at USD 310.
  - Compared to 2019, the rate in Los Cabos Corridor **increased by 40.5% (USD 191)** and recorded USD 663.
- The RevPAR in Jan-2022 was USD 258, **up 44 dollars (+20.6%)** compared to Jan-2019.

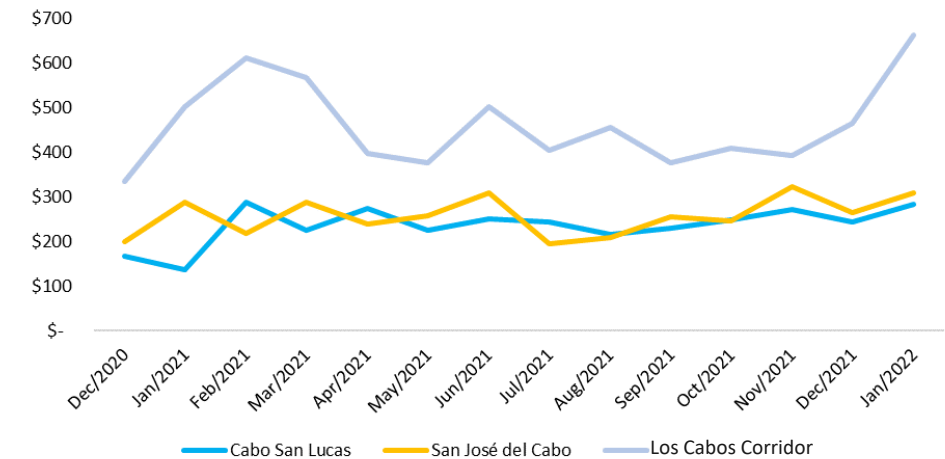
Average Hotel Rate, Los Cabos (USD, 2019-2022)



RevPAR Los Cabos (USD, 2019-2022)



Average Hotel Rate, Sub-destinations (USD, monthly, last 12 months)



SOURCE: AHLC



## LOS CABOS TOURISM OBSERVATORY

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



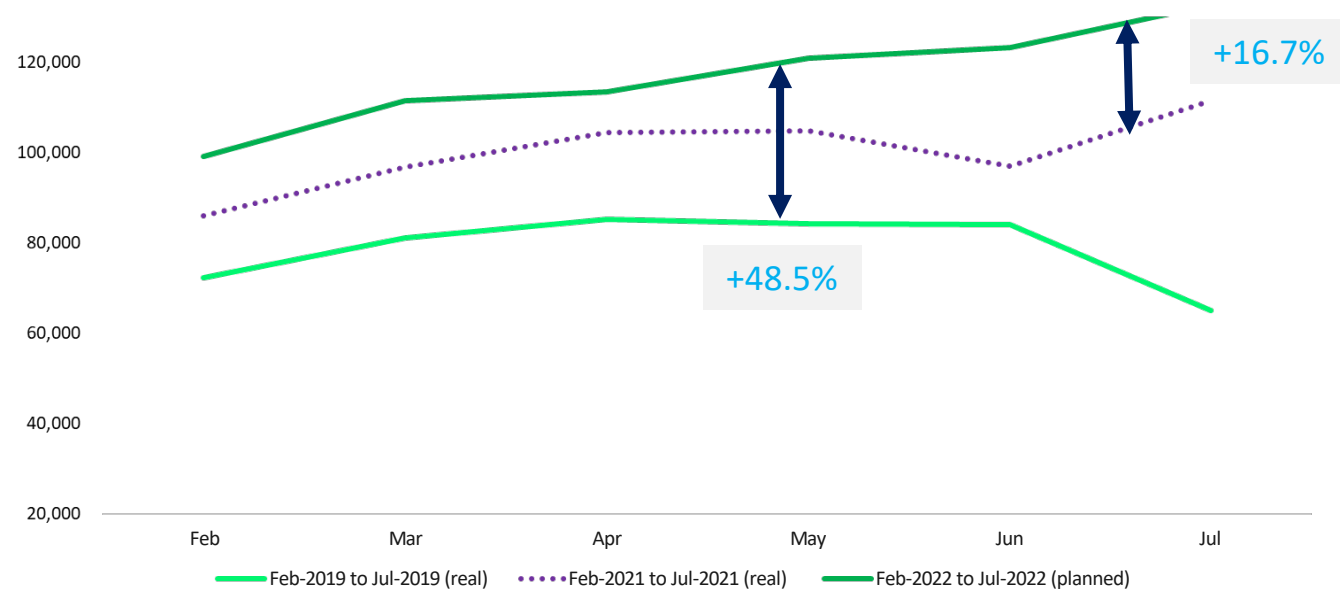
# Domestic air connectivity

## SEATS SCHEDULED FROM FEB-2022 TO JUL-2022

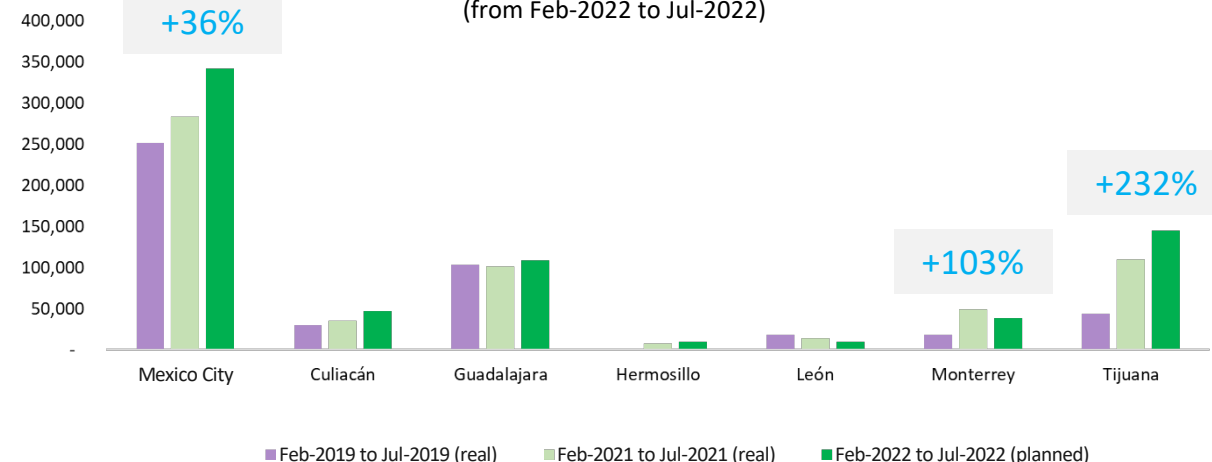
Seat offer report for the month in question and the following 6 months, as the case may be

- There are 701,288 seats scheduled for the next six months, **48.5% more** compared to the same period in 2019.
  - However, when comparing the seats scheduled for the next six months against the 2021 schedule, the volume of programmed seats is **16.7% higher**.
  - 37.4% more** available seats are expected in Feb-2022 than those scheduled for 2019.
- Mexico City, GDL, and Tijuana are the most relevant source markets, having 49%, 16%, and 21% of total available seats (for the next six months), followed by Monterrey (5%), Culiacan (7%), Leon (1%), and Hermosillo (1%).
  - Seats from CDMX, MTY, and TIJ increased by 36%, 103%, and 232%, respectively (when compared against 2019). However, BJJ decreased by 47%. Consequently, TIJ's market share grew 11pp during these six months, and BJJ's dropped 3pp.
- For the next six months, 52% of the available seats will be provided by Volaris, followed by Viva Aerobus with 30% and Aeromexico with 18%. Interjet has dropped to 0%.
  - It's worth noting that this corresponds to the information provided on the OAG portal. However, this number would likely change given the flight suspensions announced by the airline and the sales restrictions implemented by IATA.
- Load factors of domestic airlines for Nov-2021 were: Aeromexico (82%), Viva Aerobus (74%), and Volaris (76%).

Scheduled seats to San Jose del Cabo (from Feb-2022 to Jul-2022)



Number of seats scheduled, by origin (from Feb-2022 to Jul-2022)

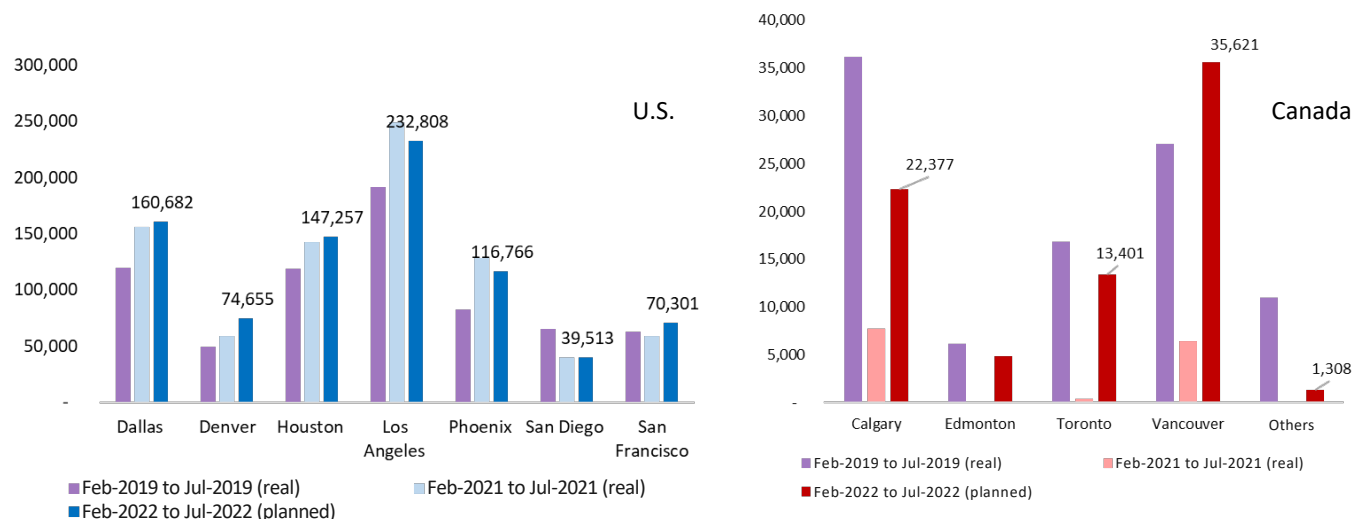
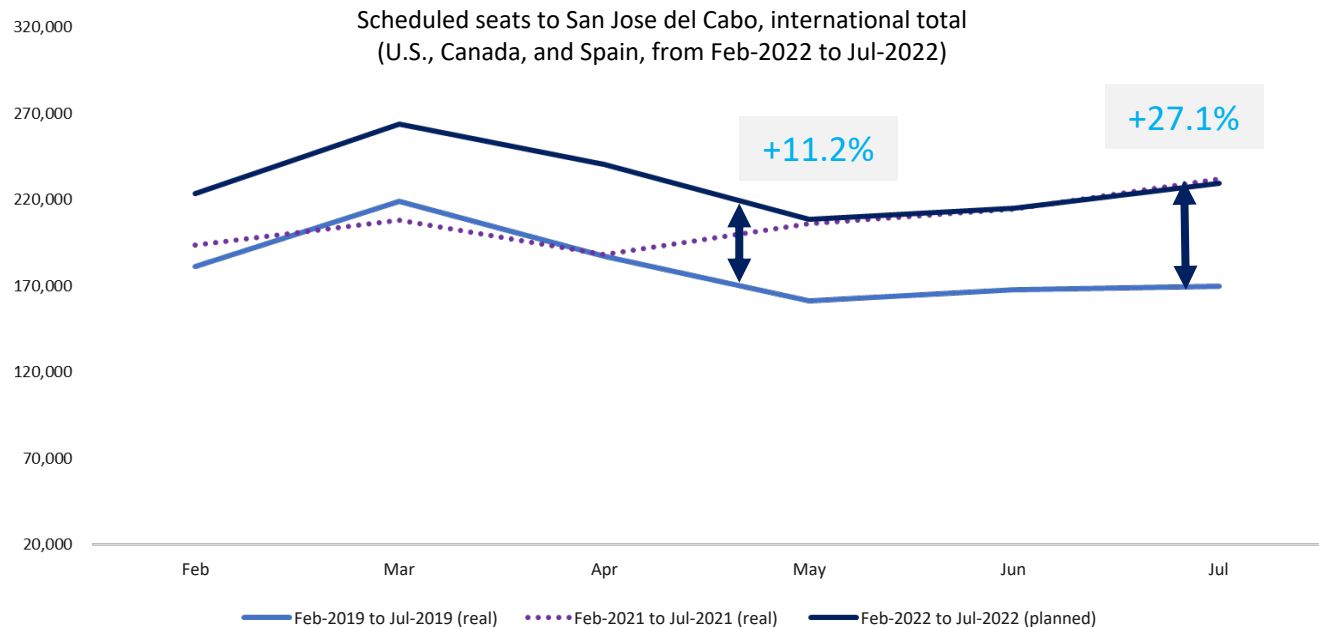


# International air connectivity

## SEATS SCHEDULED FROM FEB-2022 TO JUL-2022

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

- There are 1.31 million seats scheduled for the U.S. in the next six months, **31.6% more** seats compared to the same period in 2019.
  - However, when comparing the seats scheduled for the next six months against the 2021 schedule (pandemic), the volume of programmed seats is **6% higher**.
  - LAX (+21.5%), PHX (+42.2%), HOU (+23.7%), DFW (+33.4%), DEN (+51.5%), and SEA (+138.6%)** have the most significant increase vs. 2019. However, a decrease of 9.7% is observed in San Diego.
  - Los Angeles is the main source market in the U.S. (18% of the market), followed by DFW (12%), Houston (11%), and Phoenix (9%).
  - American, Alaska, Delta, Southwest, and United Airlines are the most relevant (90% as a whole).
  - For Feb-2022, the United States expects 38.4% more seats than those scheduled for 2019.
- There are 77,606 seats scheduled for Canada in the next six months, **20.2% fewer** seats compared to the same period in 2019.
  - When comparing the seats scheduled for the next six months against the 2021 schedule (pandemic), the volume of programmed seats is 43.2% higher.
  - There are 28.8% fewer seats expected in Feb-2022 than those scheduled for 2019.
  - A decline is anticipated in Calgary (-38.1%), Edmonton (-20.4%), and Toronto (-20.6%) within the next six months. Vancouver is expected to increase by 31.6% compared to 2019.
  - During this period, Air Canada, Sunwing, and WestJet will reduce the number of seats by 42.6%, 65.1%, and 16%, respectively. On the other hand, **Swoop and Flair Airlines have added 7.9 and 8.7 thousand seats**.
- Load factors of international airlines for Nov-2021 were: American (77%), Alaska (79%), Delta (71%), United (78%), Southwest (74%), Sunwing (67%), WestJet (89%), and Air Canada (74%).







## LOS CABOS TOURISM OBSERVATORY

**PUBLIC RELATIONS**



# Public relations: placements and scope

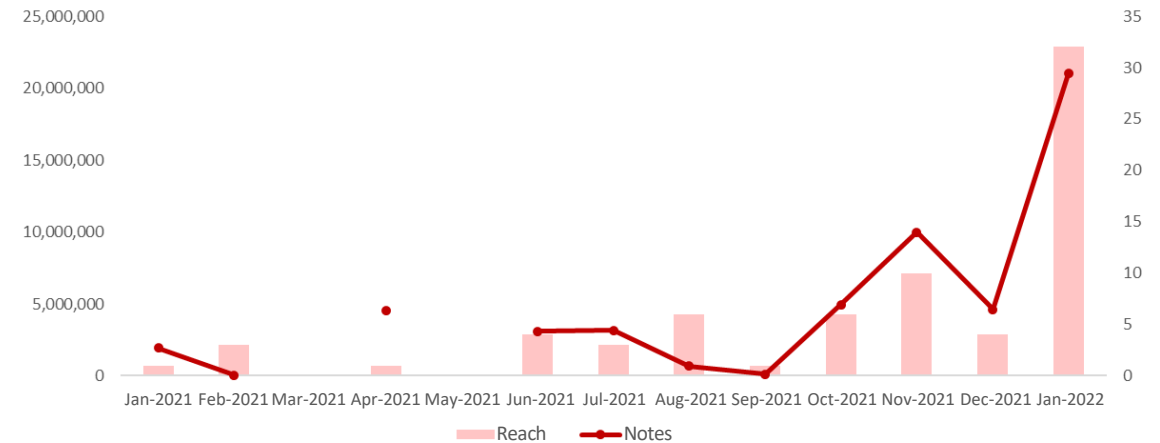
- **In the domestic market:**

- During Jan-2022, 99 placements were introduced, accounting for 5.2 million impressions. An average of 48 placements has been published monthly since the pandemic started in April 2020, with **a monthly reach of 3.9 million**.

- **In the international market:**

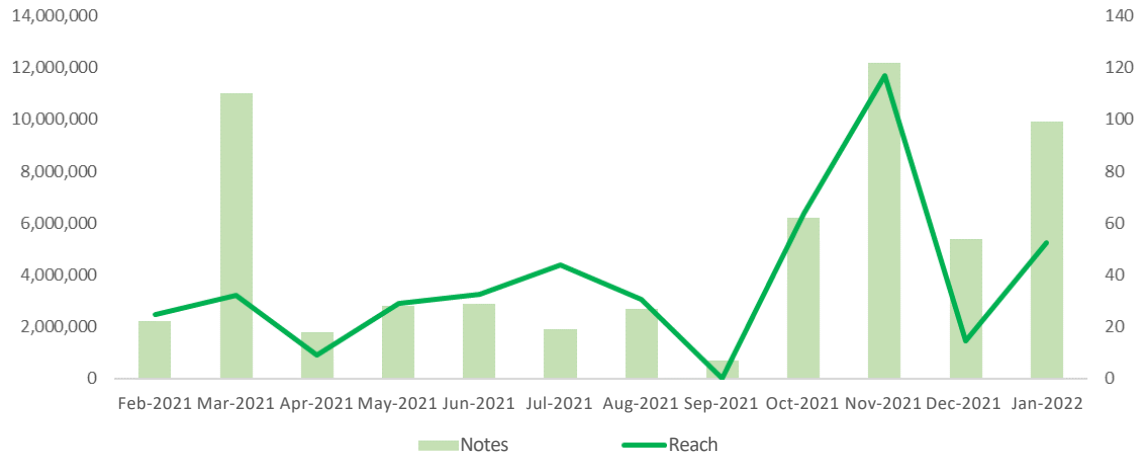
- In Jan-2022, 21 placements and 100 million impressions were achieved in the United States. An average of 22 placements has been published monthly since the pandemic started, with **a monthly reach of 634 million**.
- 32 placements were delivered to the Canadian market throughout Jan-2022, achieving 32 million impressions. An average of 7 placements has been published monthly since April, with **a monthly reach of 4.3 million**.

NOTES MADE FOR THE CANADIAN MARKET – TOTAL & REACH



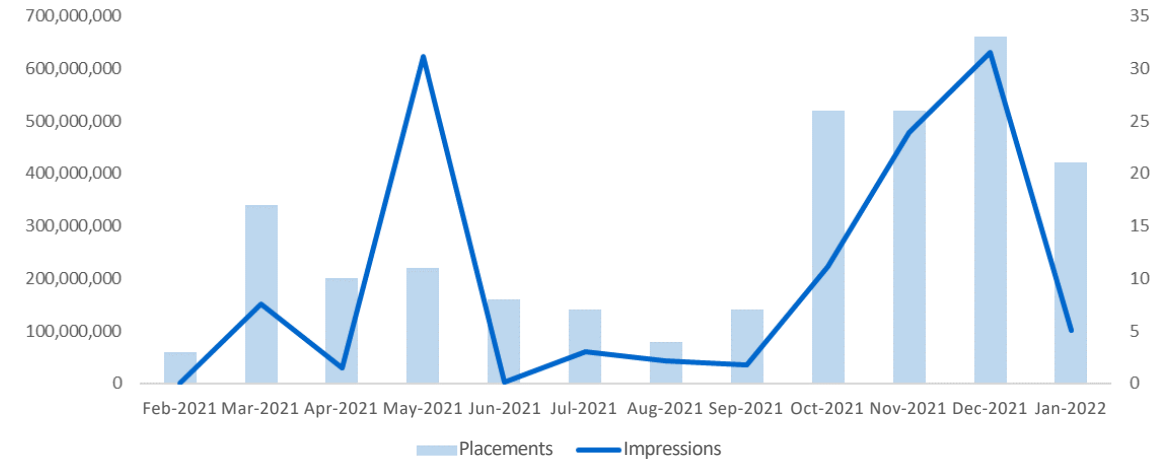
SOURCE: JESSON+CO

NOTES MADE FOR THE DOMESTIC MARKET – TOTAL & REACH



SOURCE: GAUDELLI (Feb-2018 to Jan-2019), LLORENTE & CUENCA (Feb-2019 to Jan-2022)

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



SOURCE: NJF (Feb-2018 to Jan-2019), OGILVY (Feb-2019 to Jan-2022)





## LOS CABOS TOURISM OBSERVATORY

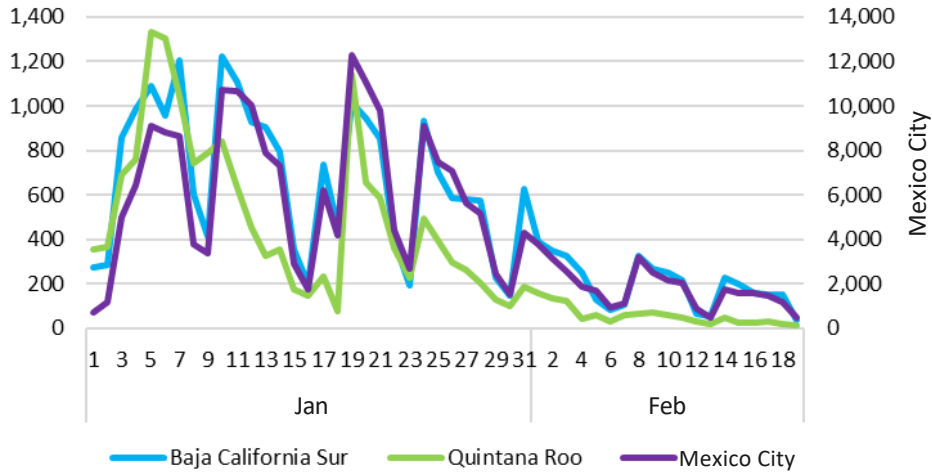
### IMPACT OF COVID-19

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

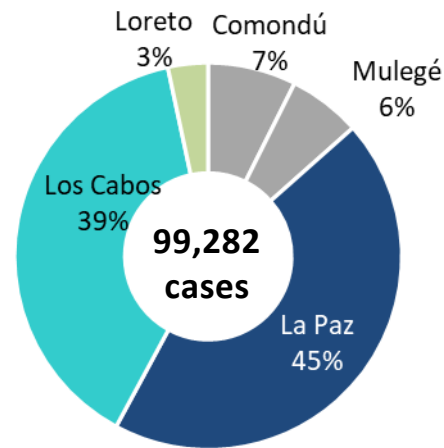


# Confirmed COVID-19 cases – overview

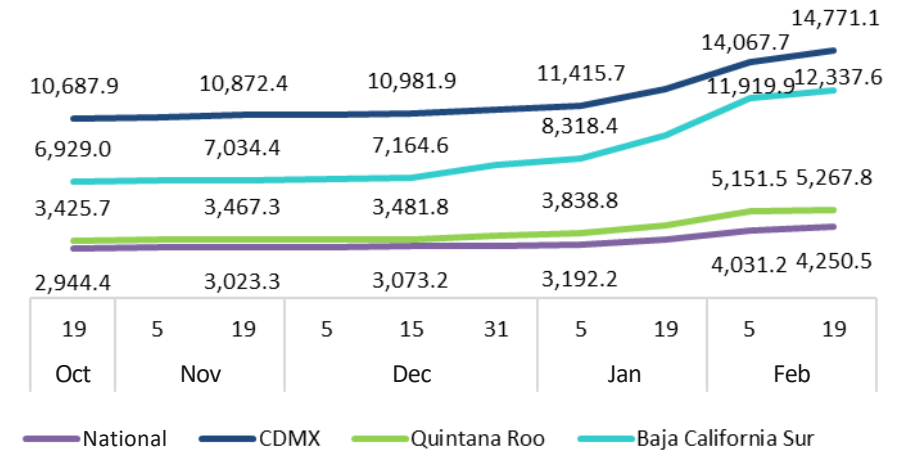
Number of daily new cases



Confirmed cases by municipalities in B.C.S.



Incidence of infection



## Total confirmed cases as of February 19, 2022

### National

**5.43 million**

- 940 thousand more cases since January 19.

### Baja California Sur

**99,282**

- 21,448 more cases than those recorded by January 19.

### Quintana Roo

**90,778**

- 15,780 more cases in the same period.

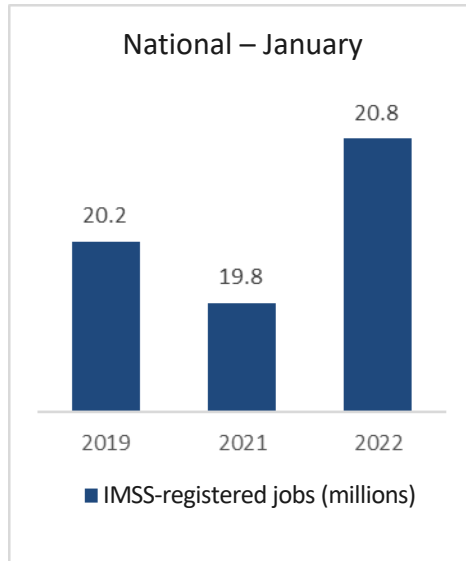
- La Paz and Los Cabos jointly account for 84% of the total confirmed cases statewide.
- Los Cabos has 37% more cases than those recorded as of January 19, 2022, adding up to a total of 38,484.
- La Paz has 23% more cases in the same period, accumulating a total of 44,126 confirmed cases.
- Loreto accumulates 3,326 cases (14% more).

- The national average rate of infection is 4,250 cases per 100 thousand inhabitants.
- Mexico City recorded the highest rate of COVID-19 cases, which is above the national average of 14,771.
- Quintana Roo: 5,267.
- Baja California Sur is the second state with the highest rate: 12,337.

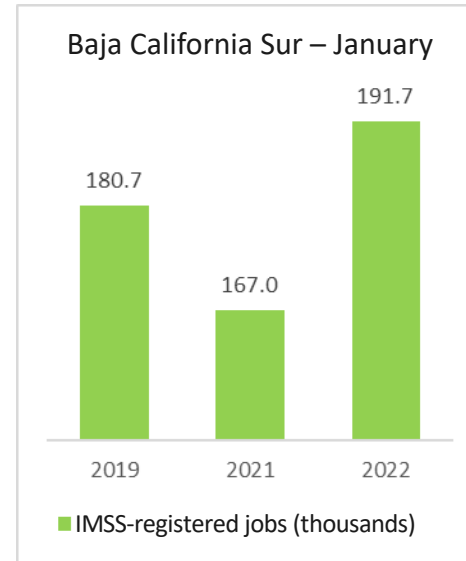
SOURCE: SECRETARIAT OF HEALTH, GENERAL DIRECTORATE OF EPIDEMIOLOGY ([www.coronavirus.gob.mx](http://www.coronavirus.gob.mx)). FIGURES UPDATED AS OF FEBRUARY 20, 2022.



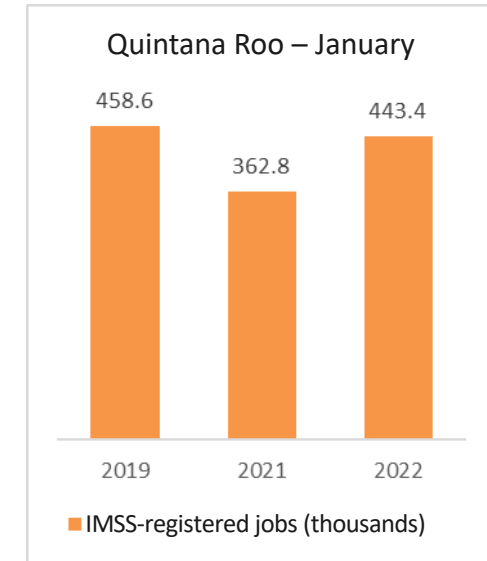
# Effects on employment in Mexico



- Mexico has 2.9% more jobs in Jan-2022 compared to Jan-2019.
- As of January 31, 2022, IMSS had registered 20,762,419 jobs in the country, which is 1.7% more than those reported in Dec-2019.



- The state has 6.1% more jobs in Jan-2022 compared to Jan-2019.
- Baja California Sur closed Jan-2022 with 191,747 jobs, 4.5% more than in Dec-2019.

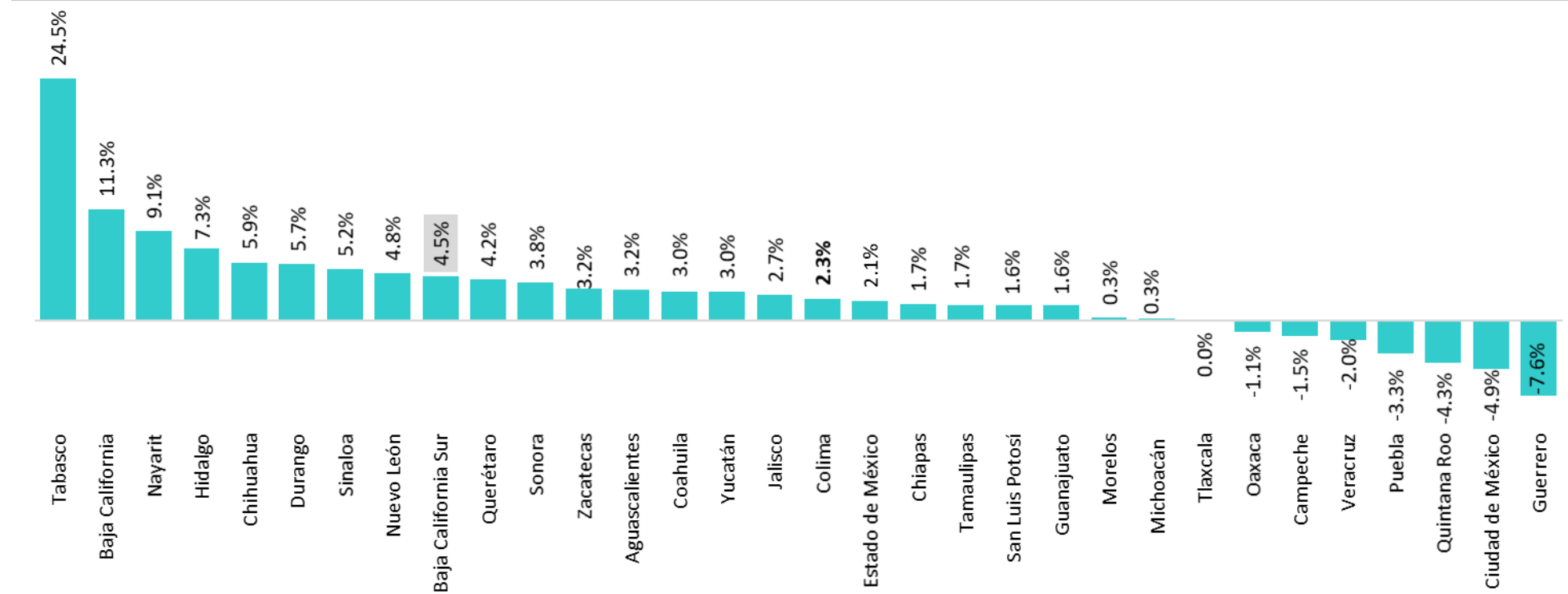


- 3.3% fewer jobs were recorded in Jan-2022 compared to Jan-2019.
- Quintana Roo closed Jan-2022 with 443,448 jobs, 4.3% fewer than in Dec-2019.

SOURCE: IMSS

# Effects on employment in Mexico

Employment variation by state (January 2022 vs. December 2019)

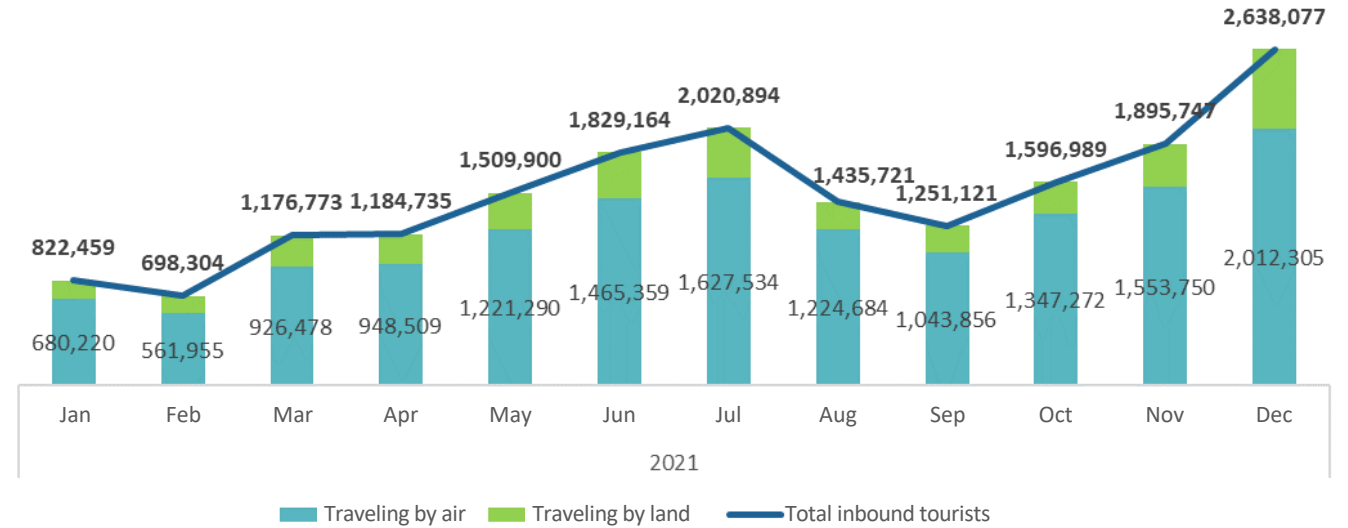
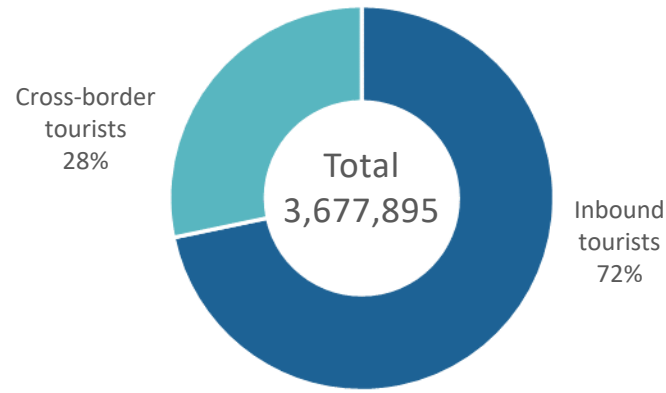


- Baja California Sur ended Jan-2022 with 4.5% more jobs than at the end of Dec-2019. Quintana Roo is still among the states that have not reached 2019 figures yet.

SOURCE: IMSS

# International tourist arrivals in Mexico

December 2021



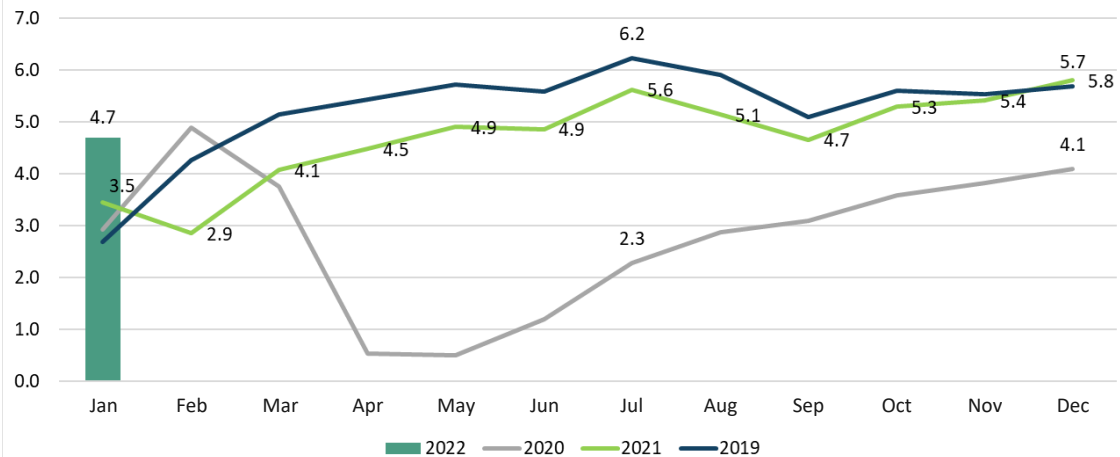
- In Dec-2021, 3.68 million international tourists arrived in the country (22% fewer than in Dec-2019). 72% were inbound tourists.
- The average spending of inbound tourists arriving by air was USD 1,053 (\$95 more than the average spending in Dec-2019).

- 39.2% more inbound tourists were recorded in Dec-2021 compared to the previous month.
- There is a 2.8% drop in the total number of inbound tourists compared to Dec-2019.
- 76% arrived by air, and 24% did so by land.

SOURCE: INTERNATIONAL TOURIST SURVEYS, INEGI

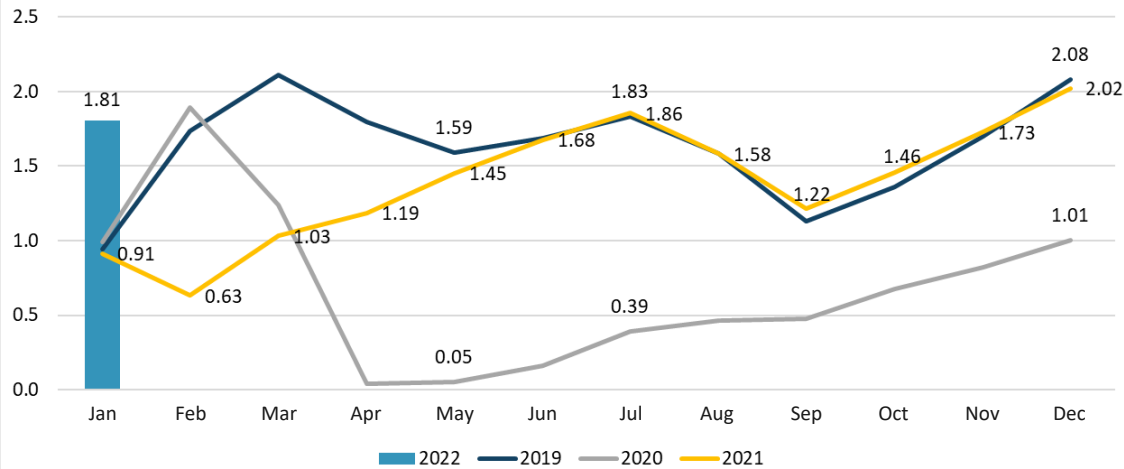
# Air traffic in Mexico – Airport groups

Domestic passenger traffic (millions)



- Through Jan-2022, domestic passenger traffic was up 75% compared with the traffic data obtained in Jan-2019.

International passenger traffic (millions)



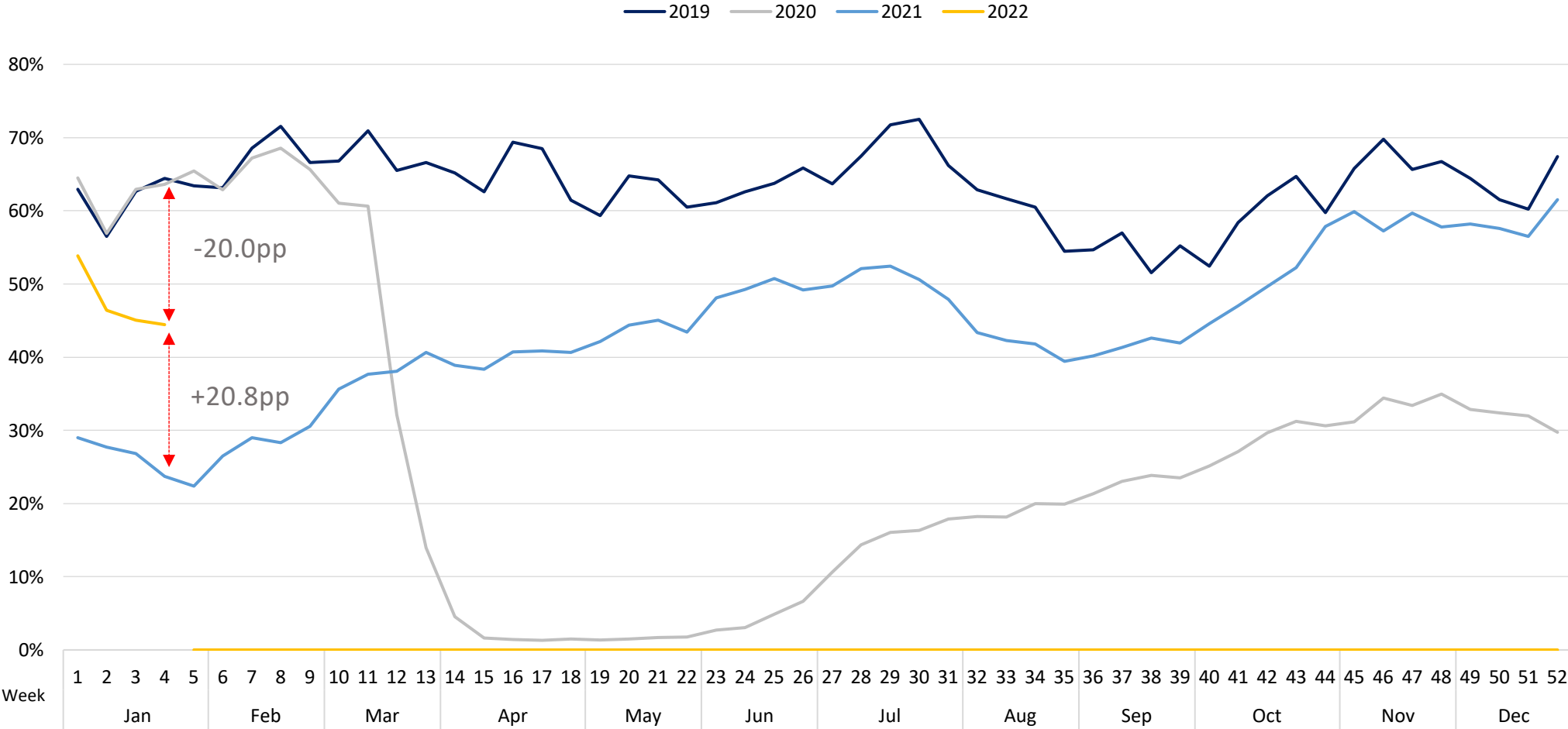
- The number of international arrivals in Jan-2022 was 92% higher than the total recorded in Jan-2019.

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)

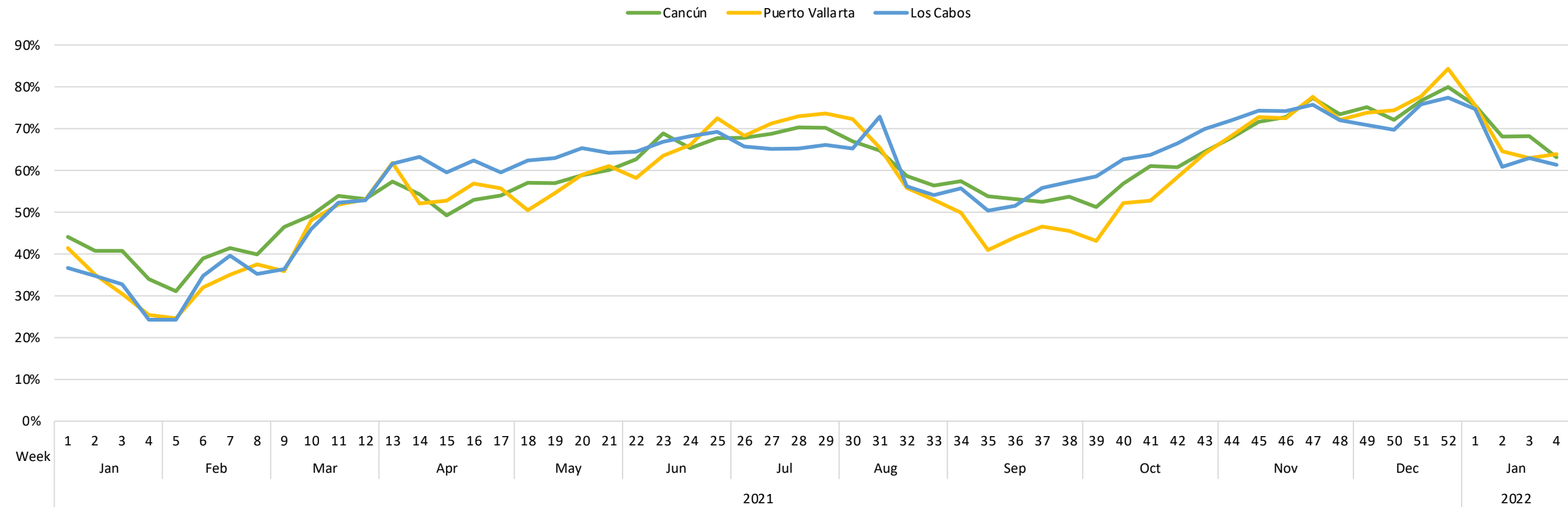


- By the end of the last week of 2021, occupancy was at 61.5%, down 5.9pp compared to the same week of 2019.
- The country reached an average hotel occupancy rate of 44.5% in the 4th week of Jan-2022, down 20pp compared to the same week of 2019, but 20.8pp above the rate recorded in the same week of 2021.

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



- In the last week of 2021, Puerto Vallarta reached an occupancy rate of 84.3%, which was higher than that of Cancun (80%) and Los Cabos (77.4%).
- By the 4th week of Jan-2022, all three destinations were above the national average of 44.5%:
  - Puerto Vallarta: 63.9%
  - Cancun: 63.1%
  - Los Cabos: 61.4%

SOURCE: DATATUR





## LOS CABOS TOURISM OBSERVATORY

### DEFINITIONS



# 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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