

LOS  CABOS

LOS CABOS  
TOURISM OBSERVATORY

KEY PERFORMANCE INDICATORS

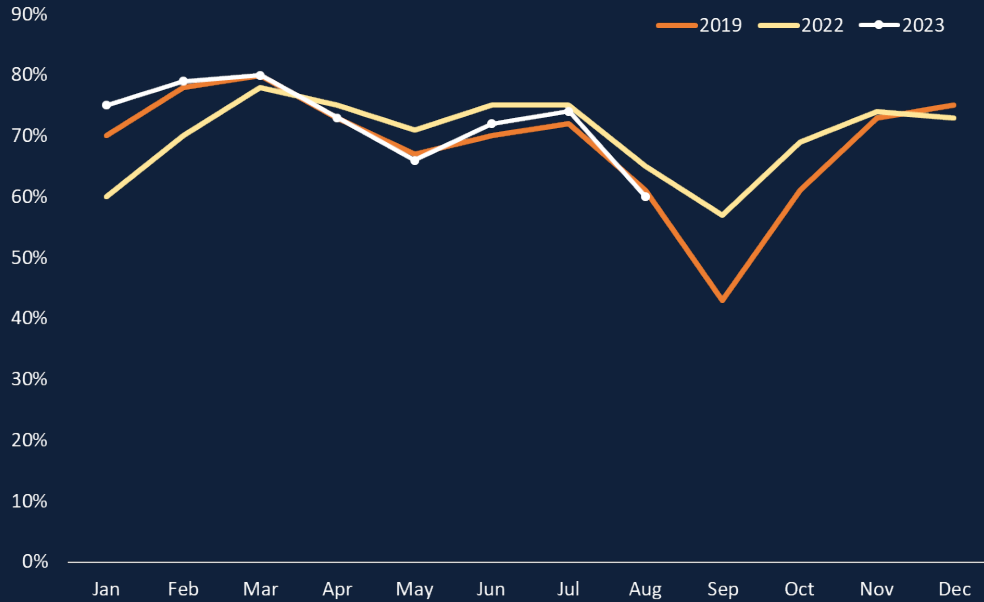
SEPTEMBER 2023



# Key Performance Indicators (Aug-2023)

## Hotel Activity

### Hotel Occupancy:



**Hotel Occupancy (Aug-2023):**  
**60%**  
**-5pp**  
 (vs Aug-2022)

SOURCE: AHLC

**Average Daily Rate (Aug-2023):**  
**\$390 USD**  
**-2%**  
 (vs Aug-2022)

SOURCE: AHLC

**RevPAR (Aug-2023):**  
**\$234 USD**  
**-10%**  
 (vs Aug-2022)

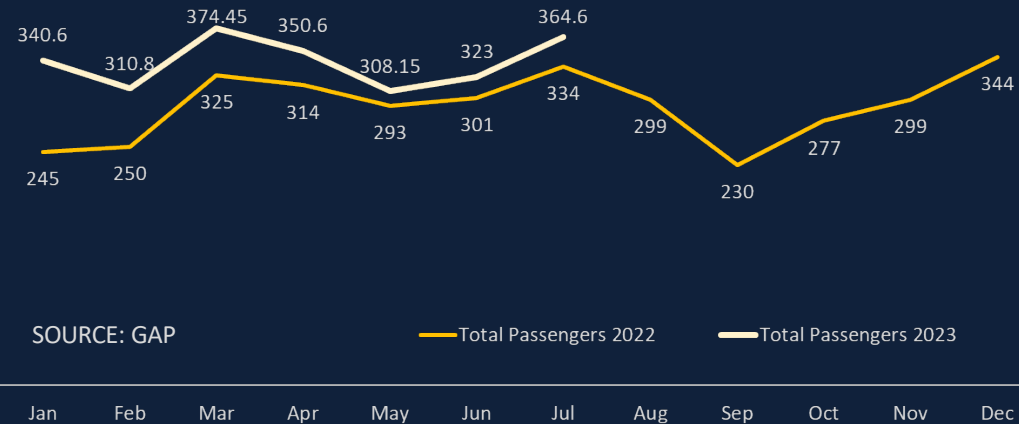
SOURCE: AHLC

## Air Passenger Arrivals

**Total Passengers (Aug-2023, '000s):**  
**314.8**  
**+5.2%**  
 (vs Aug-2022)

**Domestic Passengers (Aug-2023, '000s):**  
**151.85**  
**+16.7%**  
 (vs Aug-2022)

**International Passengers (Aug-2023, '000s):**  
**162.95**  
**-3.7%**  
 (vs Aug-2022)



SOURCE: GAP

**Tourist Satisfaction: More than Expected (Aug-2023):**  
**77%**  
**+14pp**  
 (vs Aug-2022)

SOURCE: TOURIST SURVEY

**Satisfaction with Public Safety (Aug-2023):**  
**1.4% bottom two**  
**-1.1pp**  
 (vs Aug-2022)

SOURCE: TOURIST SURVEY

**Satisfaction with the Airport (Aug-2023):**  
**1.6% bottom two**  
**-3.3pp**  
 (vs Aug-2022)

SOURCE: TOURIST SURVEY

This section shows results considering only the information available for the current month. To see the rest of the available and updated information for previous months, please refer to the corresponding sections in the body of the document.

# Executive Summary (Aug-2023)

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**HOTEL: Occupancy, average rate and RevPAR all show declines compared to Jul-2022. Occupancy decreases in all sub-destinations, and more sharply in El Corredor. However, occupancy and lodging supply in properties offered online (AirBnb and similar) continue to increase.**

- Hotel occupancy in Los Cabos in Aug-2023 registers 60%, 5pp less than in Aug-2022. At the sub-destination level Cabo San Lucas recorded 65% (+4pp), San Jose del Cabo, 59% (-6pp), and El Corredor, 46% (-7pp) compared to Aug-2022.
  - The average rate at Los Cabos hotels during Aug-2023 was \$390 USD; \$9USD less than in 2022. The highest rate is presented in El Corredor (\$459 USD), however, this drops 28% compared to the previous year; Cabo San Lucas maintains the same rate as the previous year (\$267).
  - In Aug-2023 the RevPAR was \$234 USD; -10% versus Aug-2022.
  - The volume of available rooms in Los Cabos decreases 6% versus 2022, with decreases especially in San Jose del Cabo, which loses 16.2%. Cabo San Lucas increases by 1.2%.
- On the other hand, lodging supply through online platforms has 8,866 in Aug-2023 (37.9% increase when compared to Aug-2022). Meanwhile, occupancy reached 54% (an increase of 1pp vs. 2022). Occupancy in this type of properties is lower than in traditional hotels, however, their average daily rate is higher (\$524USD versus \$390).

**TOURIST SATISFACTION: All tourist satisfaction indicators continue at high levels and improving compared to the same period in 2022. The proportion of tourists visiting restaurants remains high. This month also saw a considerable increase in overnight stays, from 6.7 to 8.6 nights.**

- In Aug-2023, 77% of tourists rate Los Cabos as "more than expected" (+14pp versus Aug-2022).
- Satisfaction with the Los Cabos airport rises 3.3 pp to 1.6% with fair or poor perception, while satisfaction with safety rises 1.1 pp to 1.4%.
- Repetitive tourists fall 7pp when compared to 2022: 37% in Aug-2023; while tourists who traveled with a package and continue at one of their lowest levels, registering 20% (-10pp).
- The proportion visiting restaurants remains unchanged this month, registering 79%.

**MEETINGS: The receipt of requests for proposals for group events remains high, growing and at levels above those recorded in 2022.**

- In Aug-2023, 18 more RFPs are received for meeting events than in Aug-2022, totaling 68. The 2023 monthly average is at 57.

# Executive Summary (Aug-2023)

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**AIR ACTIVITY:** The domestic market continues to show strong growth in flows to SJD. This growth is driven by the opening of the new route between Querétaro and Los Cabos, with flights operated by Viva Aerobus and Volaris. In this month, a 48% share of domestic passengers was recorded (the highest proportion since the beginning of this observatory). The growth of flows from the U.S. and Canada began to slow down.

- In Aug-2023, 314.8 thousand passengers arrived at Los Cabos airport (5.2% growth vs. 2022).
  - Domestic passengers (151.85 thousand) accounted for 48.2% of the total (16.7% increase vs. 2022).
    - Of these, 45.3% come from CDMX, followed by Guadalajara with 20.7% and TIJ with 18.9%.
    - Tijuana remains the Mexican market with the highest growth.
  - Passengers on international flights (162.95 thousand) represent 58.6% (3.7% decrease).
    - The main airports of origin are Los Angeles (24.6%), Dallas (15.6%) and Phoenix (14%).
    - California continues to be the main source of U.S. tourism to Los Cabos (46% of the total). Especially from Los Angeles and San Francisco. This result is due in part to the average flight cost from LAX to San Jose del Cabo, which continues to be the cheapest option in the United States (43% cheaper than the average).
    - From Canada, the main issuer in this period continues to be Vancouver (36.1%), followed by Calgary (25.8%) and Toronto (17.4%).
    - 93.4% of the foreign tourists who entered in Jul-2023 through SJD had U.S. residency and 2.8% Canadian.
    - In the cumulative Jan-Jul 2023, 61% of passengers started their trip from U.S. airports, the most used has been Los Angeles with 25.4%.
- A total of 4,382 commercial operations (2.1% more than in Aug-2022) and 542 private operations (-22.8%) were recorded at Los Cabos International Airport (SJD).
  - Commercial operations averaged 71.8 passengers per operation, while private operations averaged 3.1.
- Additionally, in Jul-2023, 4,404 international tourists arrived on private flights (21.1% decrease versus 2022).
  - The Cabo San Lucas (CSL) aerodrome received 32% of these.

**CRUISES AND YACHTS:** Cruise ship arrivals to Los Cabos show a seasonal drop in vessel arrivals, however, in Jul-2023 there will continue to be increases compared to the previous year.

- In Jul-2023 the arrival of 7 cruise ships at the Cabo San Lucas marina was recorded. This represents an increase of 3 vessels compared to the same period in 2022. These vessels transported a total of 28 thousand passengers (+52.1% vs Jul-2022).

# Market Share (Aug-2023)

SOURCE TOURIST SURVEY

WASHINGTON: 10%

NEW YORK: 5%

ARIZONA: 4%

CALIFORNIA: 46%

BAJA CALIFORNIA: 11%

TEXAS: 19%

NUEVO LEÓN: 5%

JALISCO: 5%

MEXICO CITY + STATE: 36%

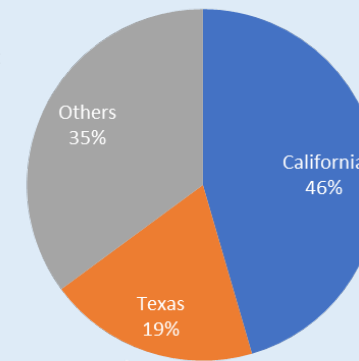
**United States:**  
**49.4%**  
**-5pp (vs Aug-2022)**

**Canada:**  
**2.4%**  
**+0.4pp (vs Aug-2022)**

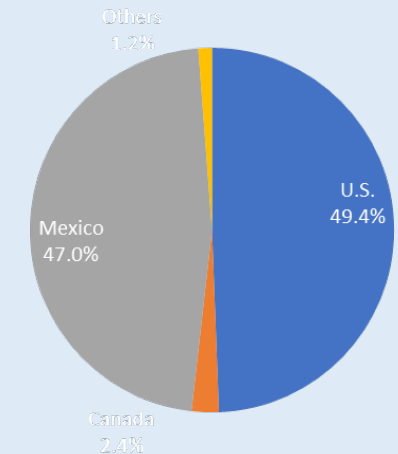
**Domestic:**  
**47%**  
**+4.6pp (vs Aug-2022)**

**Others:**  
**1.2%**  
**+0pp (vs Aug-2022)**

**U.S. Market:**



**Total Market:**



On the right side are presented the percentages for each of the tourist issuing markets to Los Cabos, while the map shows the total per each state within the same market. For example, the percentage that is presented for California (left), is the participation that that state has within the total (100%) of U.S. tourists that arrive in Los Cabos, whereas the column on the right shows the total tourists that arrive in Los Cabos representing the United States as a whole.

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AIR PASSENGER ARRIVALS



# Key Indicators (Aug-2023)

Total Passengers:  
**314.8 thousand** ↑  
+5.2% vs Aug-2022

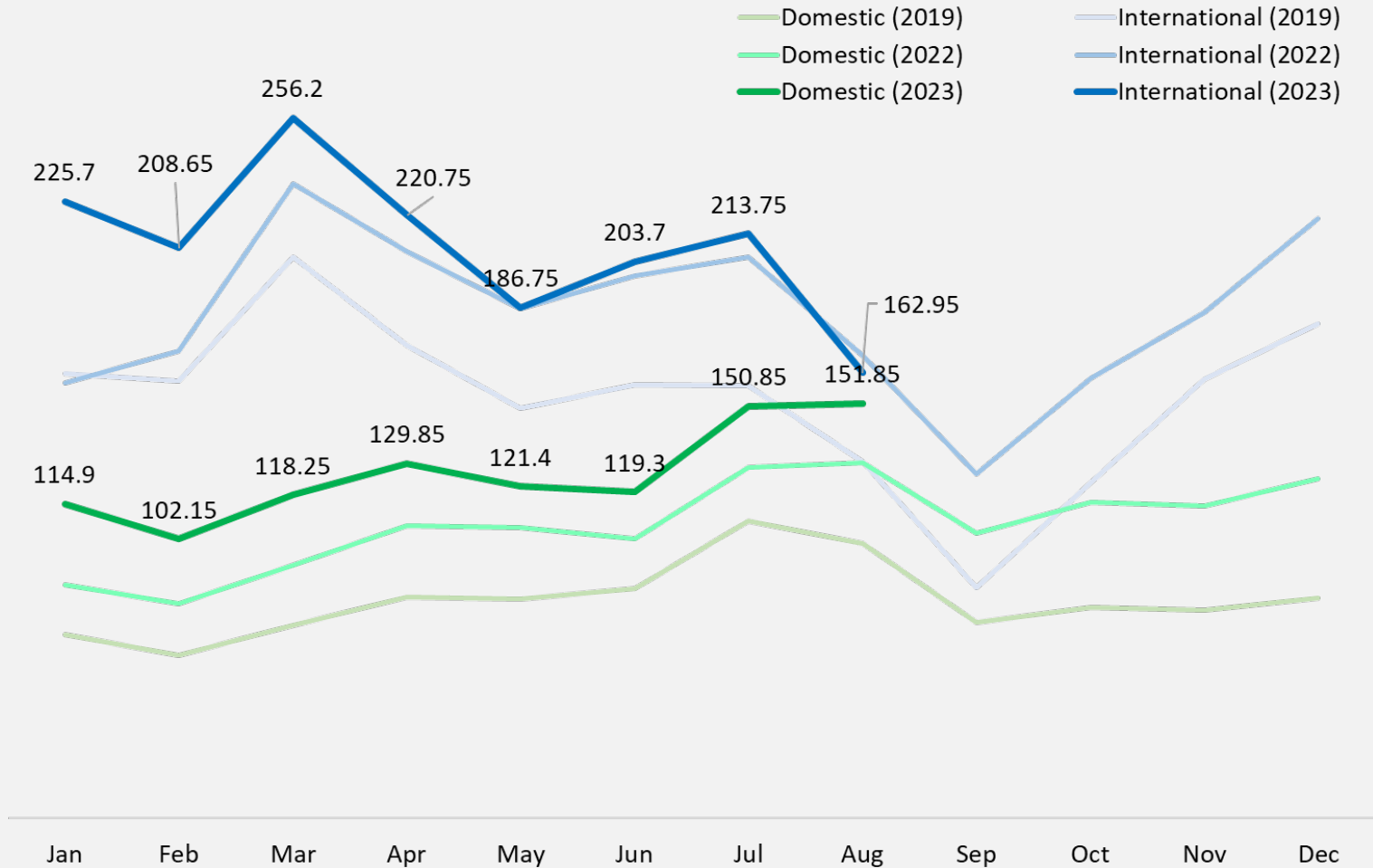
Domestic Passengers:  
**151.85 thousand** ↑  
+16.7% vs Aug-2022

International Passengers:  
**162.95 thousand** ↓  
-3.7% vs Aug-2022

 Domestic:  
**48.2%**  
Intern.: **51.8%**

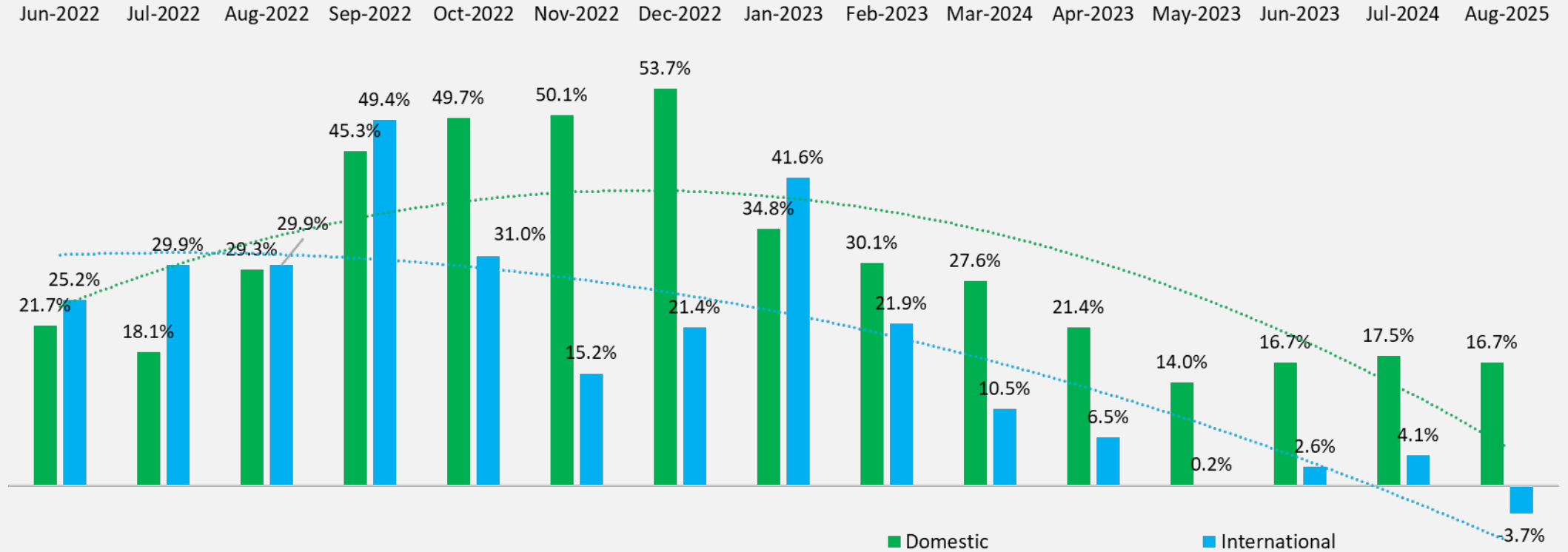
Source: GAP

# Passenger Arrivals at Los Cabos Airport, 2019-2023 (Aug-2023)



# Passenger Arrivals at Los Cabos Airport, 2019-2023

Percentual change from previous year (2022 vs. 2019; 2023 vs. 2022)

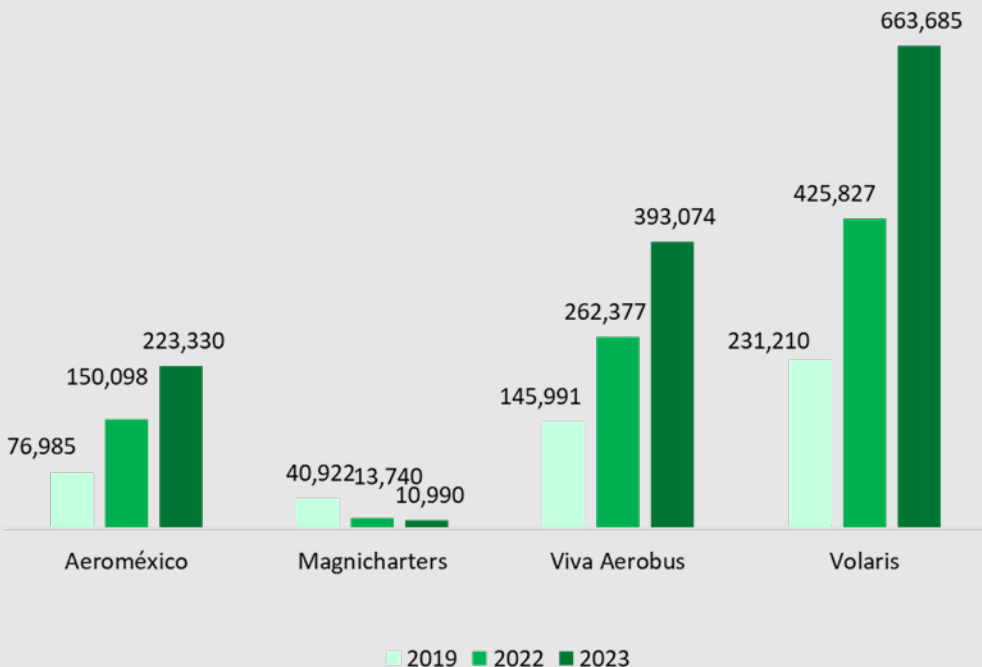


SOURCE: GAP

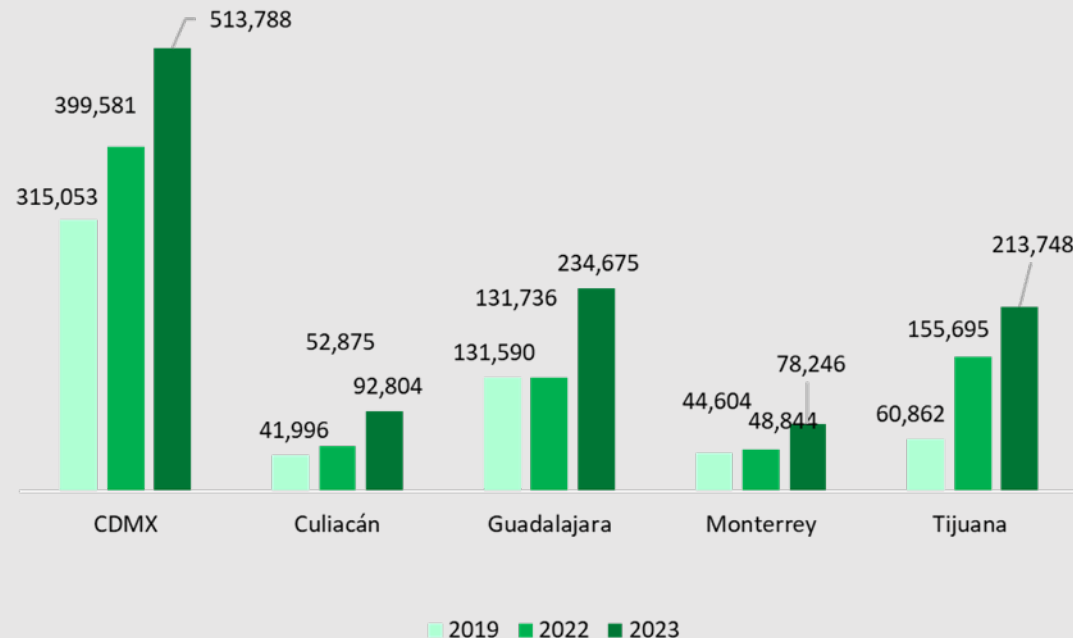


# Cumulative Passenger Arrivals at Los Cabos airport, Domestic Flights, cumulative Jan-Aug-2023

Domestic passenger arrivals at San José del Cabo airport, by airline (Jan-Aug 2019-2023)



Passenger arrivals on international flights to San José del Cabo airport, by origin - Domestic (Jan-Aug 2019-2023)



SOURCE: PAXIS

Cumulative PAX:  
**1.29 million**  
+51.5% vs 2022



Per origin:

GDL: **20.7%** +4 pp vs 2022  
 CDMX: **45.3%** -5.3 pp vs 2022  
 TIJ: **18.9%** -0.9 pp vs 2022  
 MTY: **6.9%** +0.7 pp vs 2022

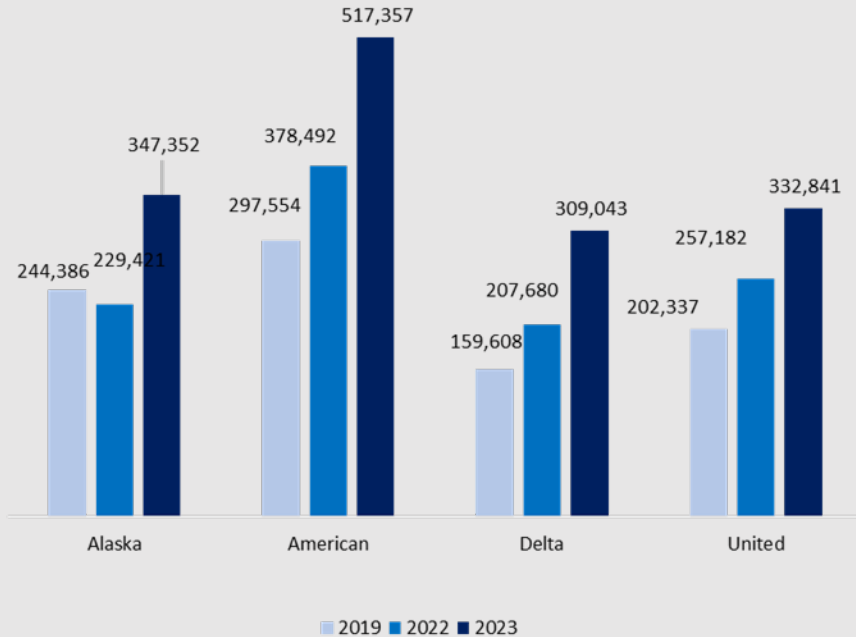
Per airline:

AM: **17.3%** -0.3 pp vs 2022  
 GMT: **0.9%** -0.8 pp vs 2022  
 VIV: **30.4%** -0.3 pp vs 2022  
 VOI: **51.4%** +1.4 pp vs 2022

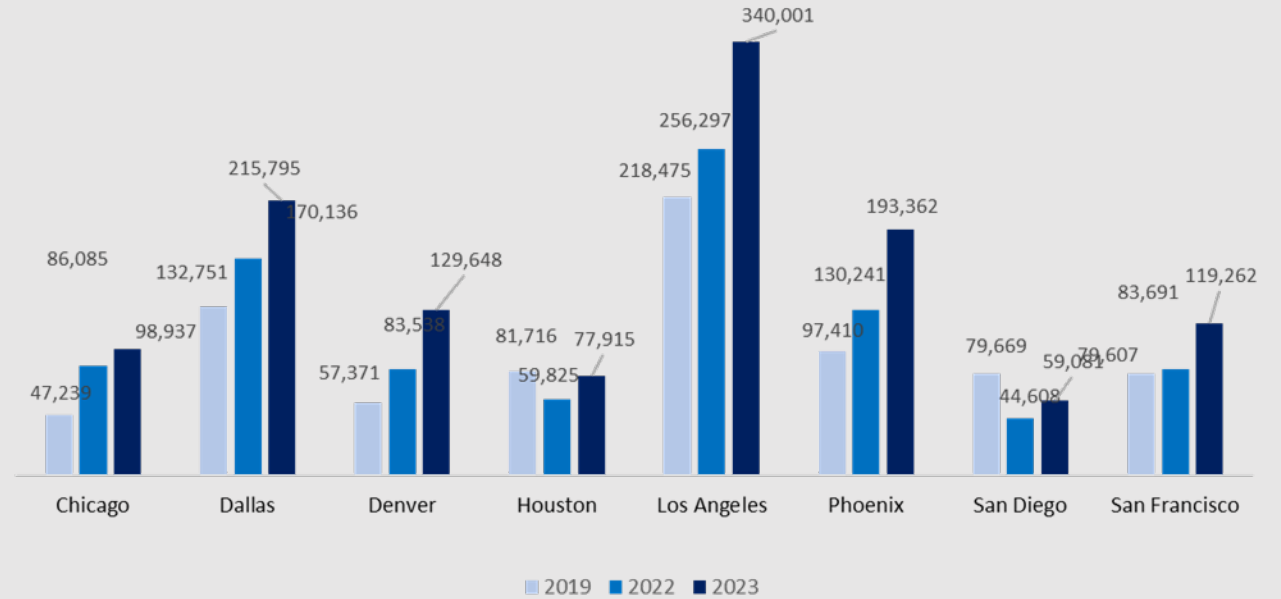


# Cumulative Passenger Arrivals at Los Cabos airport, U.S. Flights, cumulative Jan-Aug-2023

International passenger arrivals at San José del Cabo airport, by airline, U.S. (Jan-Aug 2019-2023)



Passenger arrivals on international flights to San José del Cabo airport, by origin - U.S. (Jan-Aug 2019-2023)



SOURCE: PAXIS

Cumulative PAX:  
**1.94 million**  
+37.2% vs 2022



Per origin:

DFW: **15.5%** -7.6 pp vs 2022  
 LAX: **24.3%** -9.7 pp vs 2022  
 PHX: **14.1%** -3.7 pp vs 2022  
 DEN: **9.7%** -1.9 pp vs 2022

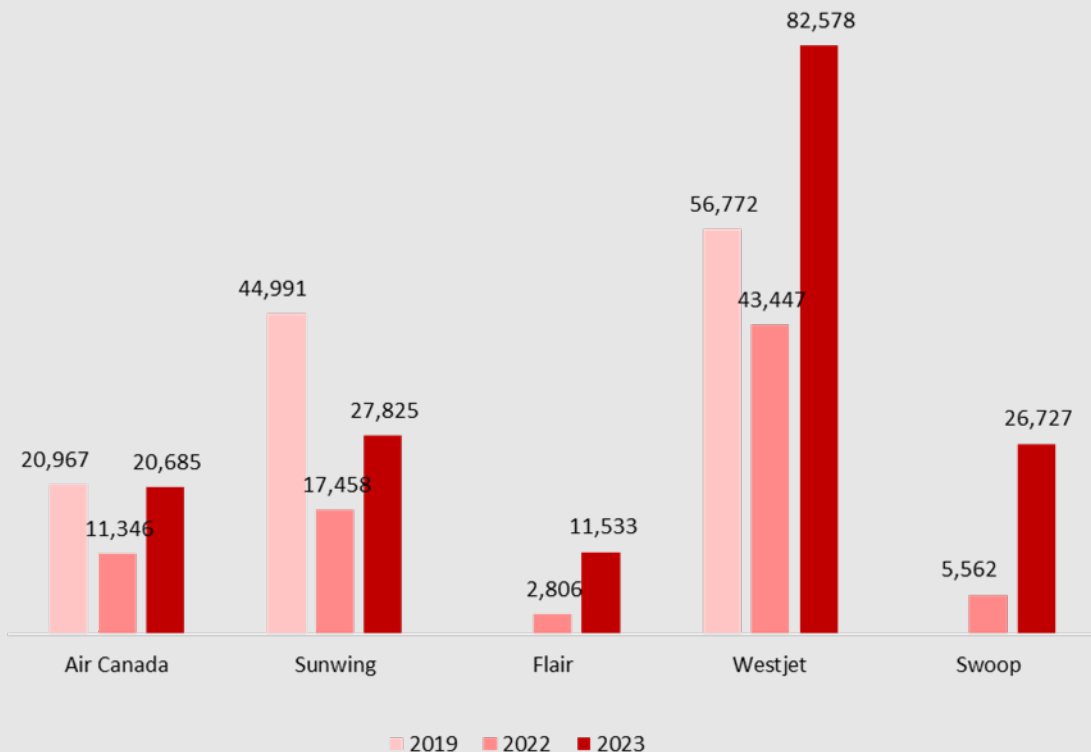
Per airline:

AS: **17.9%** +1.7 pp vs 2022  
 AA: **26.7%** -0.1 pp vs 2022  
 DL: **15.9%** +1.2 pp vs 2022  
 UA: **17.2%** -1 pp vs 2022

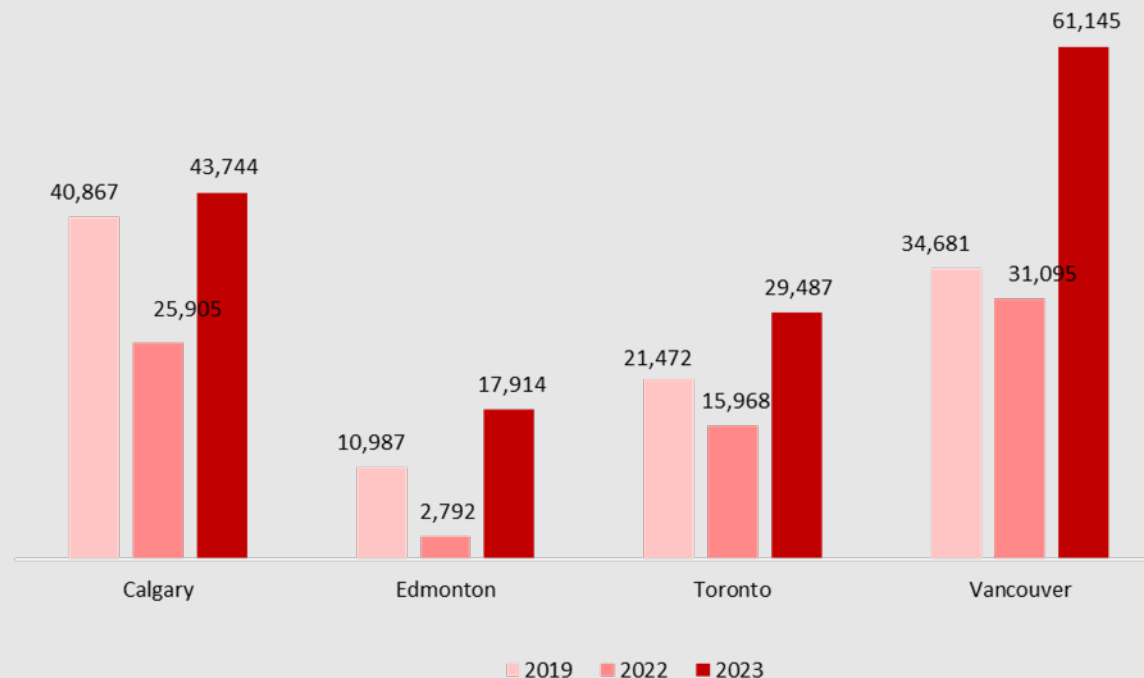


# Cumulative Passenger Arrivals at Los Cabos airport, **Canadian Flights**, cumulative Jan-Aug-2023

International passenger arrivals at San José del Cabo airport, by airline, Canada (Jan-Aug 2019-2023)



Passenger arrivals on international flights to San José del Cabo airport, by origin - Canada (Jan-Aug 2019-2023)



SOURCE: PAXIS

Cumulative PAX:  
**169.3 thousand**   
 +10.1% vs 2022



Per origin:

YYC: **25.8%** -6.3 pp vs 2022  
 YVR: **36.1%** -2.5 pp vs 2022  
 YEG: **10.6%** +7.1 pp vs 2022  
 YYZ: **17.4%** -2.4 pp vs 2022

Per airline:

AC: **12.2%** -1.9pp vs 2022  
 WG: **16.4%** -5.2 pp vs 2022  
 WS: **48.8%** -5.1 pp vs 2022  
 WO: **15.8%** +8.9 pp vs 2022



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PASSENGER ARRIVALS  
BY NATIONALITY



Key Indicators  
(Jul-2023)

International Arrivals  
(Jul-2023):

**202,339**



+1.9% vs Jul-2022

International Arrivals  
(Cum):

**1,458,894**



+10.2% vs 2022

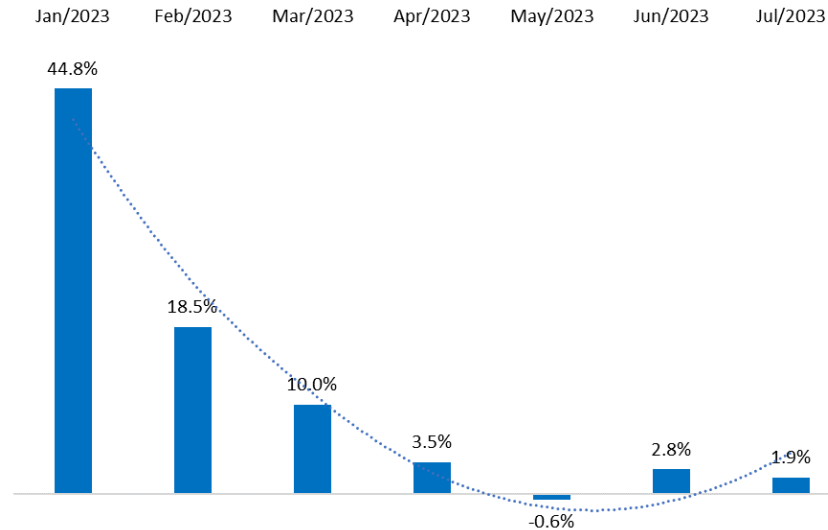


U.S.: **93.4%**

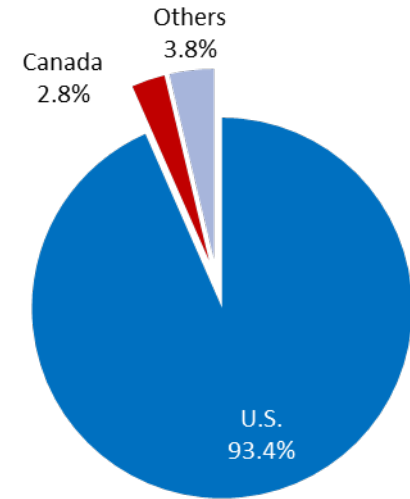
Canada.: **2.8%**

# Foreign Tourist Admittances through SJD by Country of Nationality (Jul-2023)

Annual change in foreign tourist arrivals to  
San Jose del Cabo airport (Jan-Jul 2023 vs.  
2022)



Foreign Tourist Arrivals in San Jose del  
Cabo International Airport, per  
Nationality (Jul-2023)



\* **Explanatory note:** Beginning with this edition, it has been decided to modify the source of data used to account for tourist arrivals. Previously, the accounting was based on the residence reported by tourists upon entering national territory; however, the nationality of the passport presented is now reported. This modification improves accuracy in the measurement of volumes and origins of foreign tourists, although it prevents direct comparison with previous data based on residence.

SOURCE: INM- SIOM

# International Arrivals in SJD, monthly, U.S. Residents

Key Indicators  
(Jul-2023)



U.S. Arrivals (Jun):

**188,202**

+1.2% vs Jul-2022



U.S. Arrivals  
(Cum. 2023):

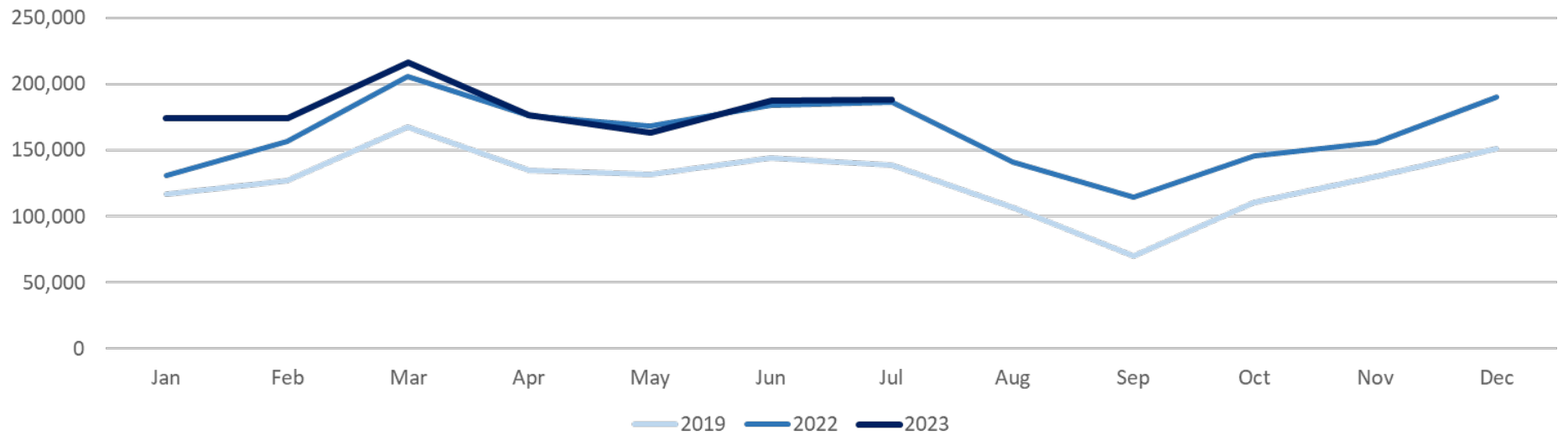
**1,280,267**

+6% vs 2022



SOURCE: INM- SIOM

U.S.A.	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	116,768	126,889	167,789	134,996	131,702	143,761	138,450	106,630	70,362	110,410	130,268	150,759
2022	130,868	156,938	205,552	176,019	168,295	183,796	185,903	140,663	114,496	145,383	155,561	189,828
2023	174,428	174,010	216,342	176,471	163,585	187,229	188,202	-	-	-	-	-



**\* Explanatory note:** Beginning with this edition, it has been decided to modify the source of data used to account for tourist arrivals. Previously, the accounting was based on the residence reported by tourists upon entering national territory; however, the nationality of the passport presented is now reported. This modification improves accuracy in the measurement of volumes and origins of foreign tourists, although it prevents direct comparison with previous data based on residence.

Key Indicators  
(Jul-2023)



Canadian Arrivals (Jul):

**5,719**

-8.6% vs Jul-2022



Canadian Arrivals  
(Cum. 2023):

**130,457**

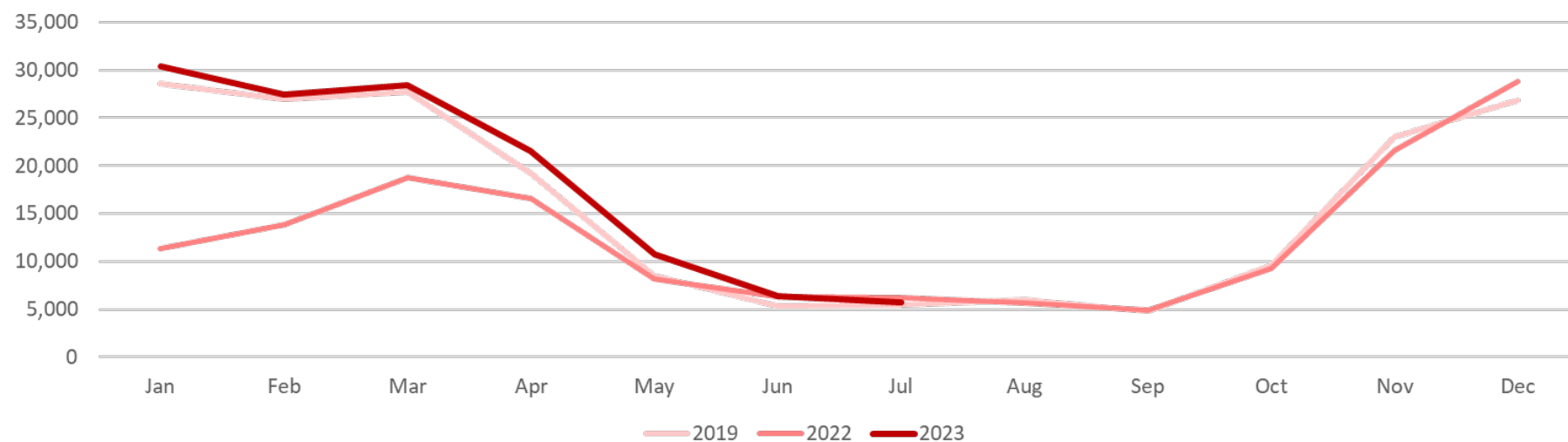
+60.3% vs 2022



SOURCE: INM- SIOM

# International Arrivals in SJD, monthly, Canadian Residents

Canada	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	28,530	26,956	27,728	19,168	8,507	5,348	5,492	6,028	4,758	9,618	23,065	26,854
2022	11,350	13,856	18,778	16,595	8,222	6,300	6,260	5,707	4,891	9,302	21,635	28,846
2023	30,352	27,397	28,412	21,566	10,683	6,328	5,719	-	-	-	-	-

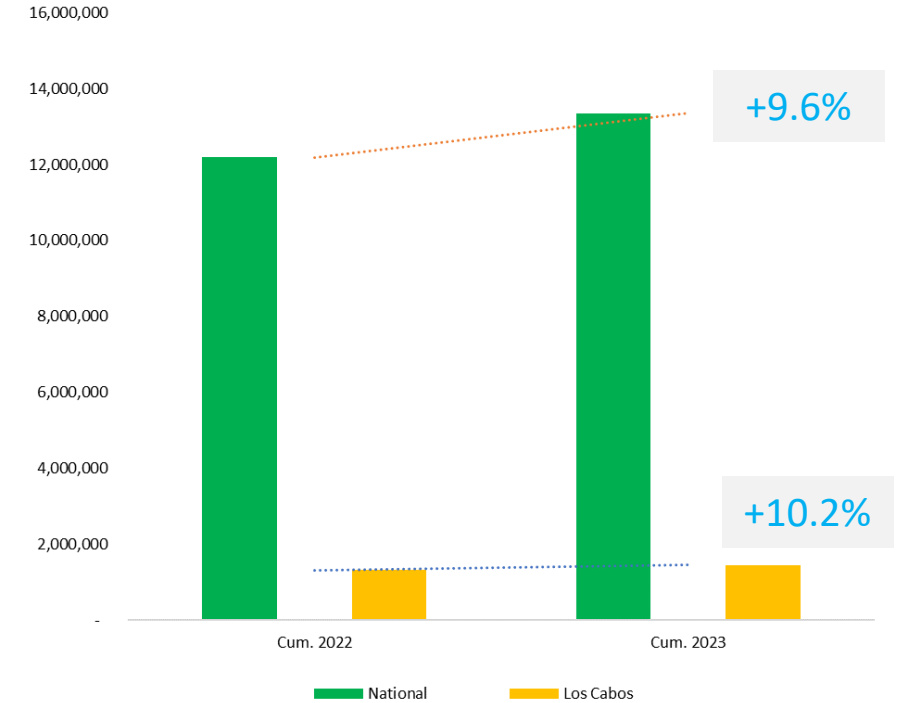


**\* Explanatory note:** Beginning with this edition, it has been decided to modify the source of data used to account for tourist arrivals. Previously, the accounting was based on the residence reported by tourists upon entering national territory; however, the nationality of the passport presented is now reported. This modification improves accuracy in the measurement of volumes and origins of foreign tourists, although it prevents direct comparison with previous data based on residence.

# Foreign Tourist Admittance through SJD by Nationality, cumulative

Region	National			Los Cabos		
	Cum. 2022	Cum. 2023	Δ 2023/2022	Cum. 2022	Cum. 2023	Δ 2023/2022
United States	7,968,251	8,429,916	5.8%	1,207,371	1,280,267	6.0%
Canada	945,575	1,544,979	63.4%	81,361	130,457	60.3%
Europe	1,293,215	1,285,930	-0.6%	14,201	17,468	23.0%
Caribbean, South and Central A.	1,614,496	1,604,255	-0.6%	5,494	5,938	8.1%
Rest	364,041	485,965	33.5%	14,884	24,764	66.4%
<b>Total</b>	<b>12,185,578</b>	<b>13,351,045</b>	<b>9.6%</b>	<b>1,323,311</b>	<b>1,458,894</b>	<b>10.2%</b>

Key Market	National			Los Cabos		
	Cum. 2022	Cum. 2023	Δ 2023/2022	Cum. 2022	Cum. 2023	Δ 2023/2022
United Kingdom	325,446	280,098	-13.9%	5,281	6,035	14.3%
Australia	19,930	35,916	80.2%	2,460	4,189	70.3%
South Korea	30,237	50,200	66.0%	1,374	2,409	75.3%
<b>Total</b>	<b>375,613</b>	<b>366,214</b>	<b>-2.5%</b>	<b>9,115</b>	<b>12,633</b>	<b>38.6%</b>



SOURCE: INM- SIOM

International Arrivals, all Mexico (Cum.):

**13.35 million**

+9.6% vs 2022



Key Markets, all Mexico (Cum.):

**262.8 thousand**

-2.5% vs 2022



International Arrivals, SJD (Cum.):

**1.46 million**

+10.2% vs 2022



Key Markets, SJD (Cum.):

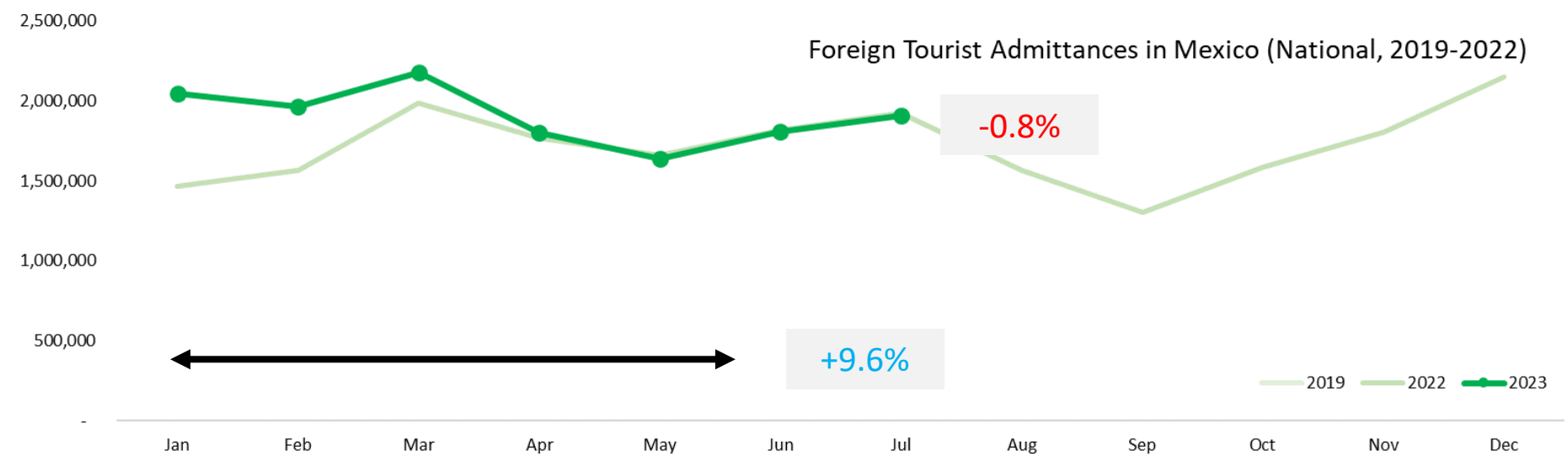
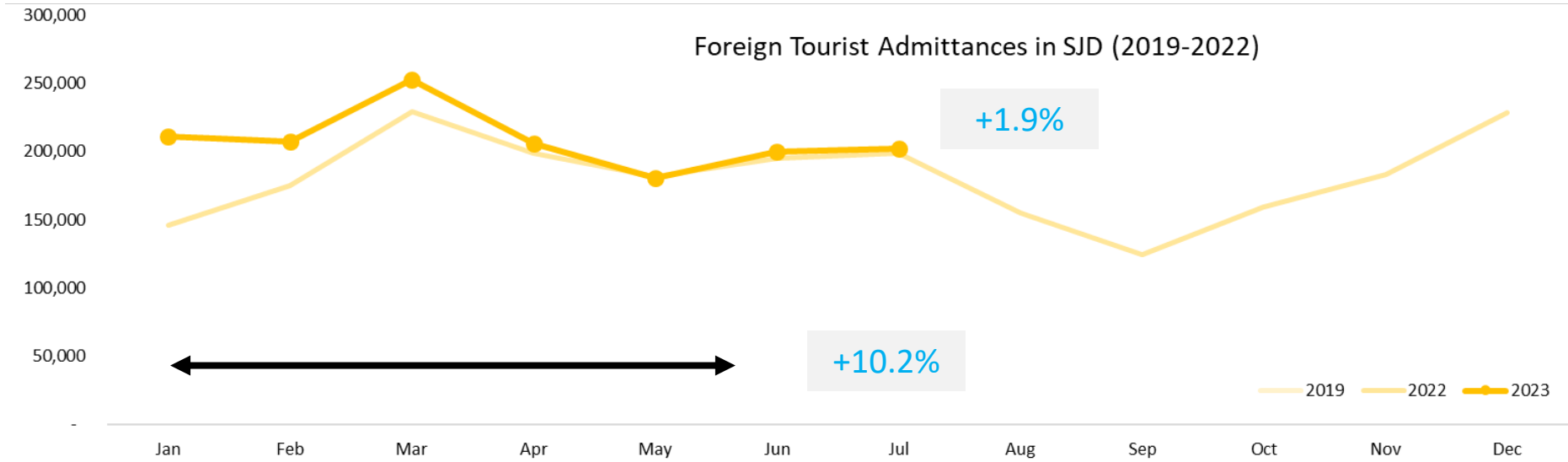
**12.6 thousand**

+38.6% vs 2022





# Foreign Tourist Admittances through SJD by Nationality, cumulative Jan-Jun 2023 (cont.)



SOURCE: INM- SIOM

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CRUISE AND YACHT ACTIVITY



# Cruise Activity (Jul-2023)

## Key Indicators (Jul-2023)

Vessels (month)

**7**

(+3 vs Jul-2022)



Vessels (cum.)

**156**

(+25.8% vs 2022)



PAX (month)

**28,012**

(+52.4% vs Jul-2022)



PAX (cum.)

**489,623**

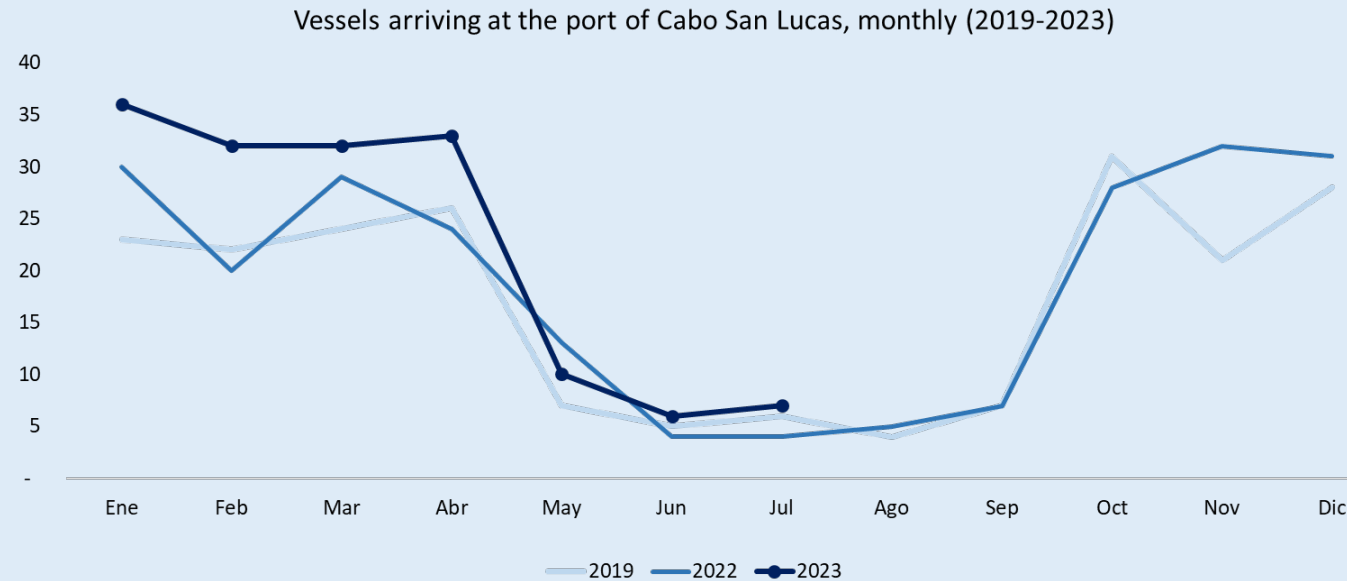
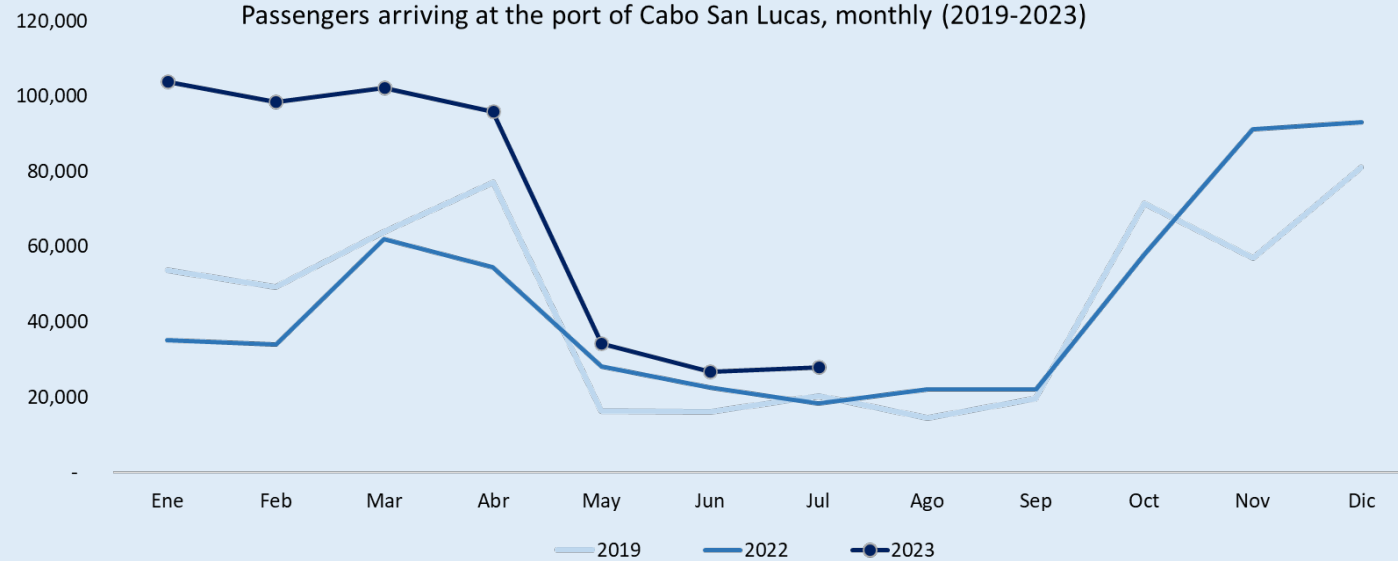
(+92.1% vs 2022)



PAX/Vessel

**4,002**

(-12.9% vs Jul-2022)



Source: DATATUR-SCT

# Yacht Arrivals in Cabo San Lucas (Aug-2023)

## Key Indicators (Aug-2023)

Yachts (current month)

**41**

(+7.9% vs Aug-2022)



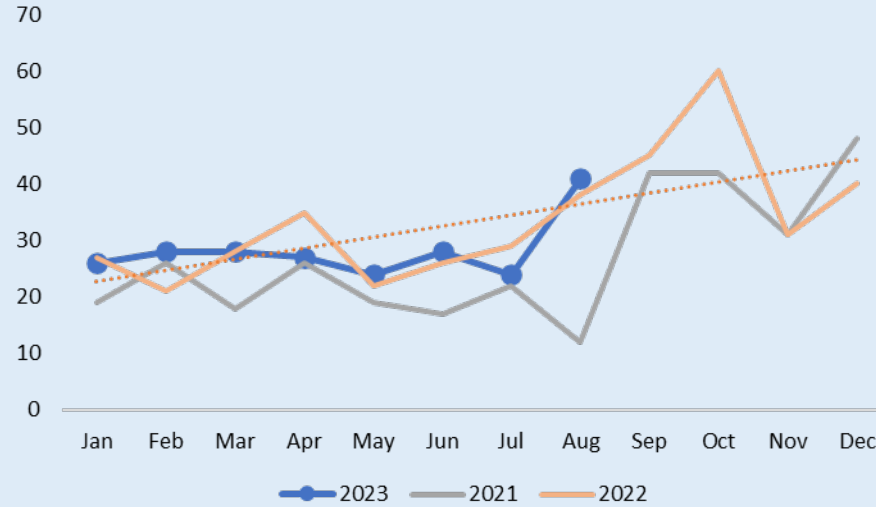
Yachts (cumulative 2023)

**226**

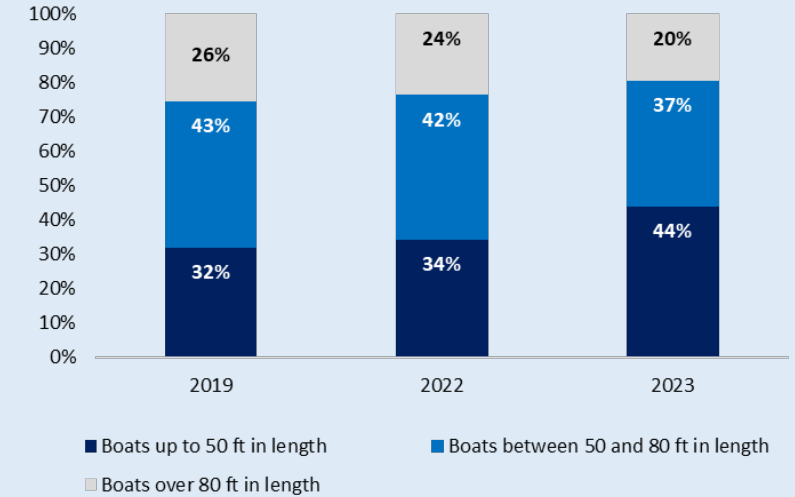
(+0% vs 2022)



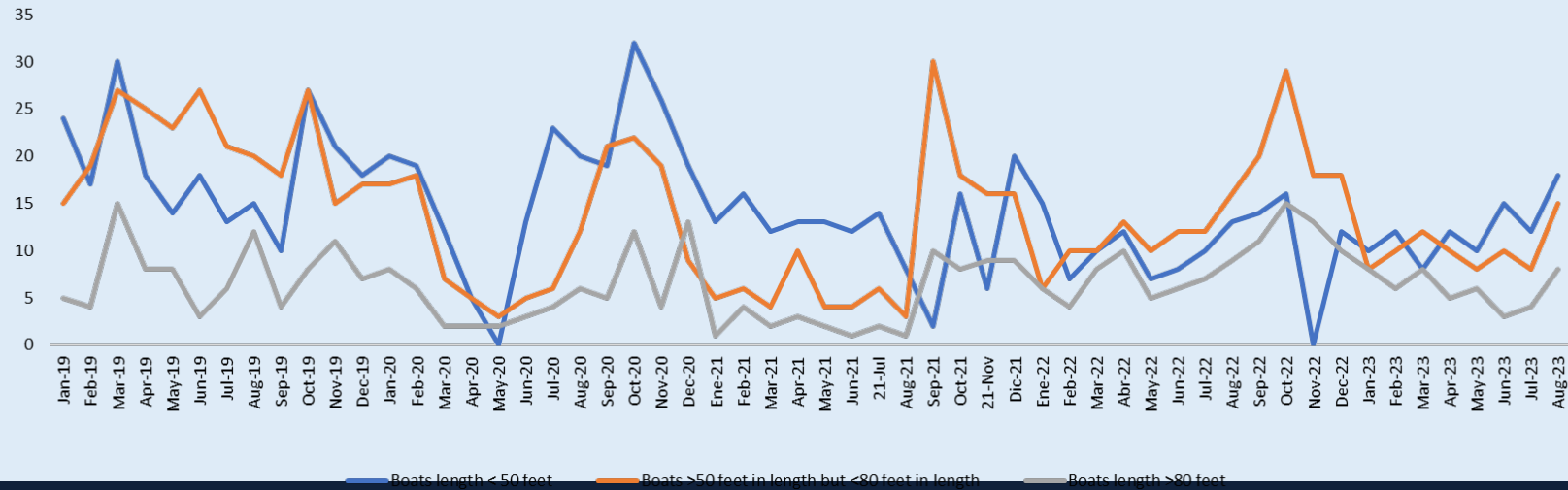
Monthly Yacht Arrivals (2019-2023)



Arrivals per Vessel Size



Monthly Arrivals per Vessel Size (2019-2023)



Source: API Cabo San Lucas

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TOURIST SURVEYS AND  
MEETINGS



## Key Indicators (Aug-2023)

RFPs (month)

**58**

(-18 vs Aug-2022)

RFPs (cumulative)

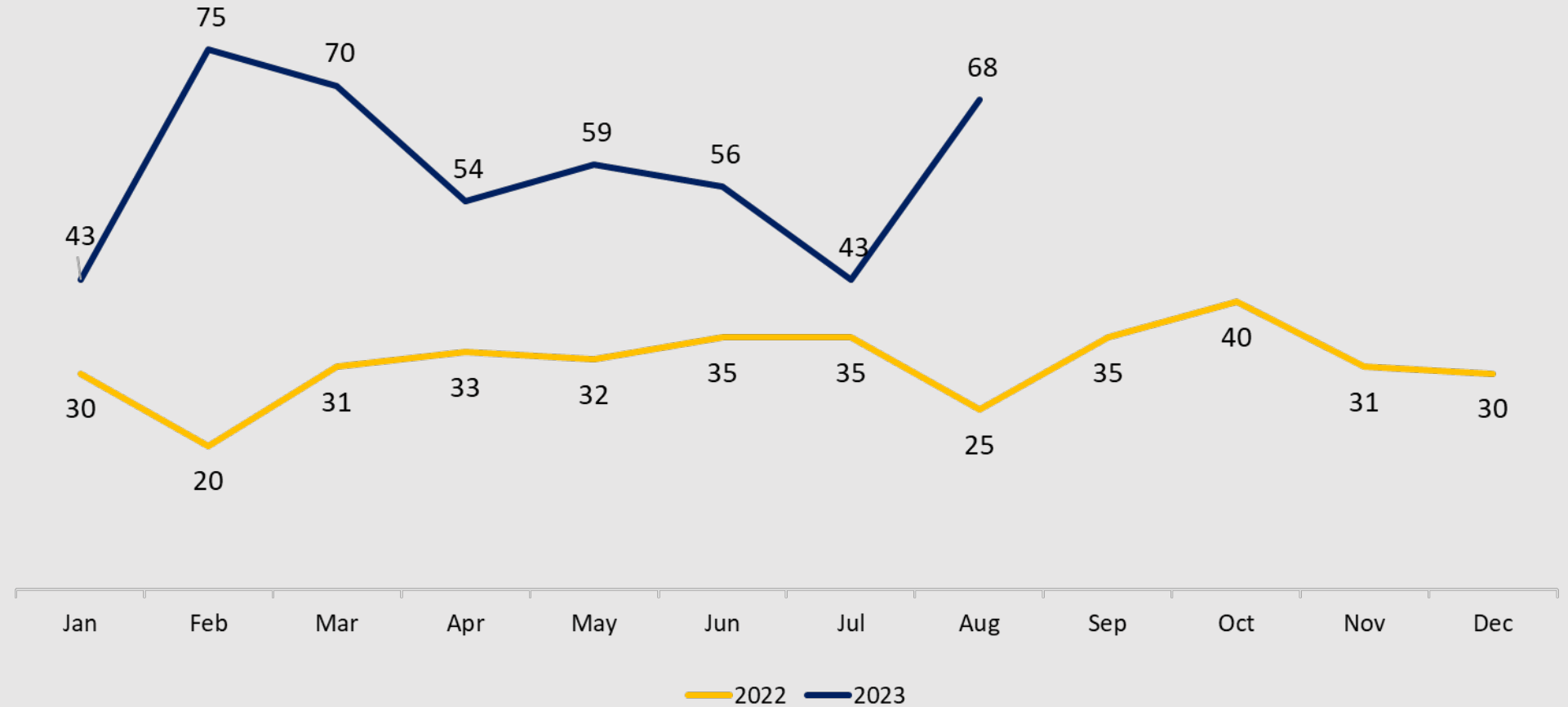
**468**

(+20.6% vs 2022)



# Meetings (Aug-2023)

Received RFPs for Meetings and Group Events, 2022-23 (CVENT)



SOURCE: CVENT

# Returning Tourists

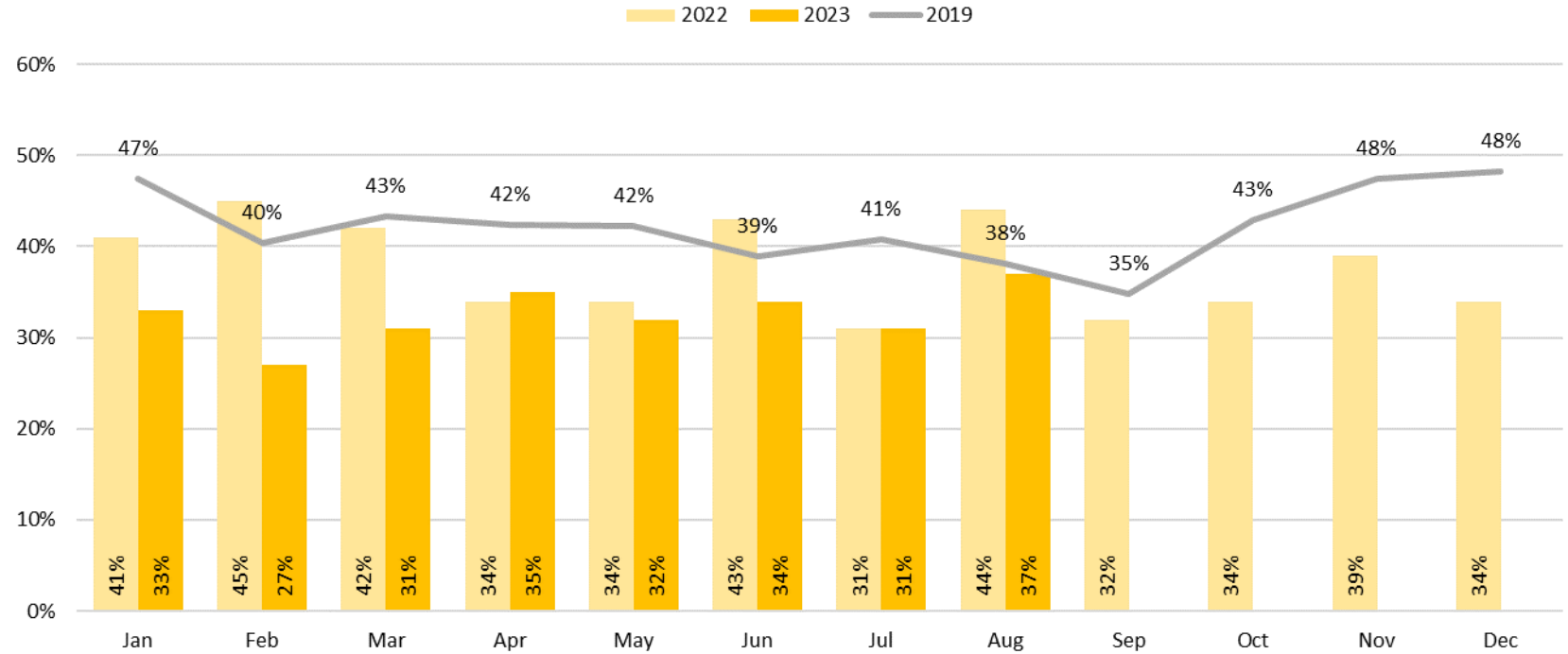
## Repetitive Tourists

Jul-2023:

37%

-7 pp

Vs Aug-2022



SOURCE: TOURIST SURVEY

# Package Tours

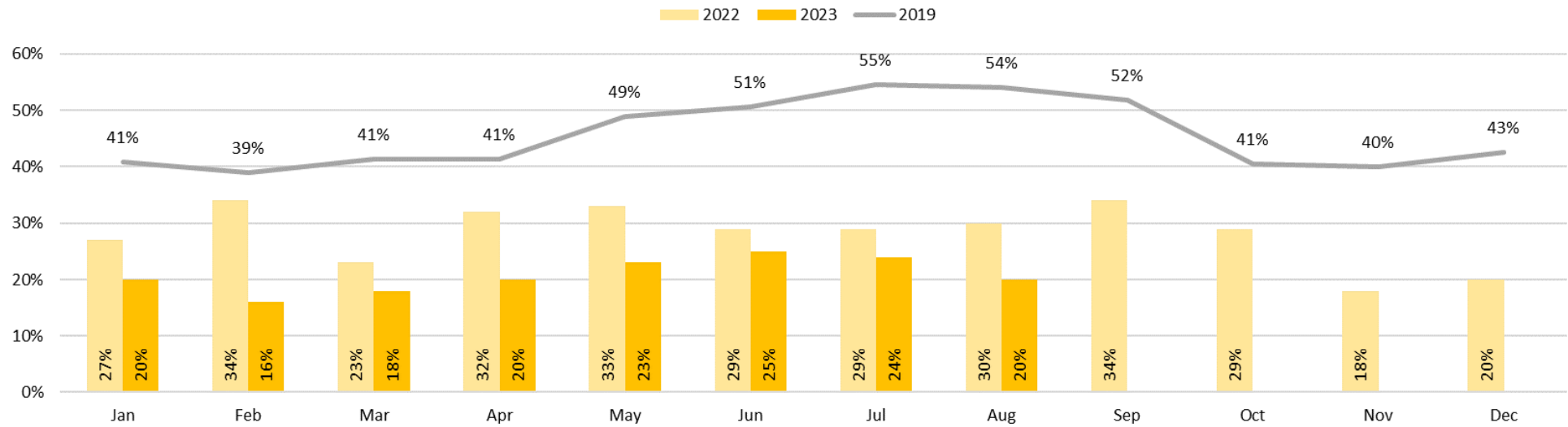
## Package Tour

Jul-2023:

20%

-10pp

vs Aug-2022



SOURCE: TOURIST SURVEY



# Timeshares

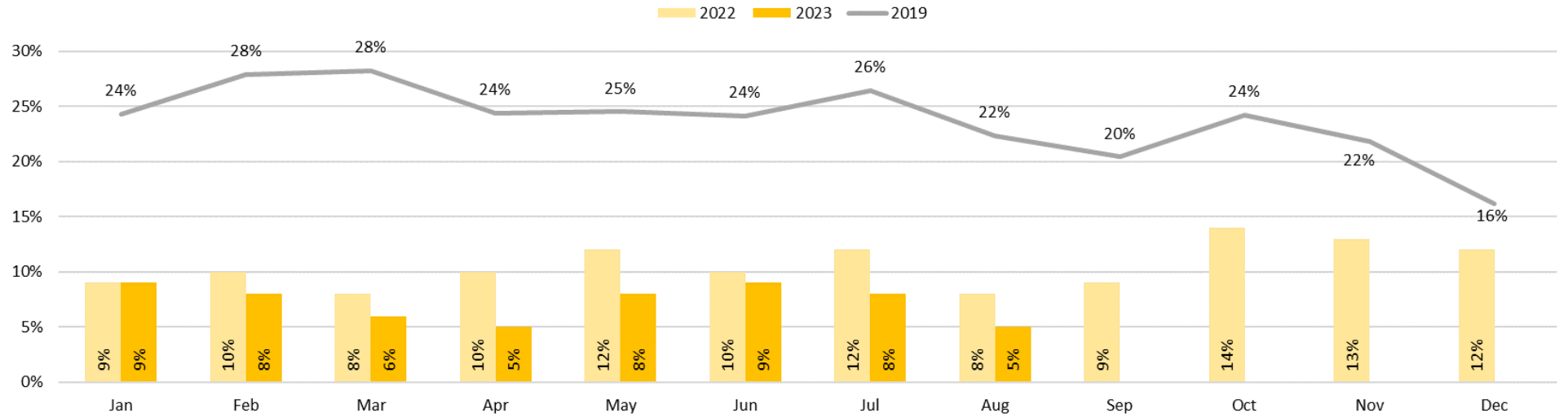
## Timeshare Use

Jul-2023:

5%

-3pp

Vs Aug-2022



SOURCE: TOURIST SURVEY

LOS  CABOS

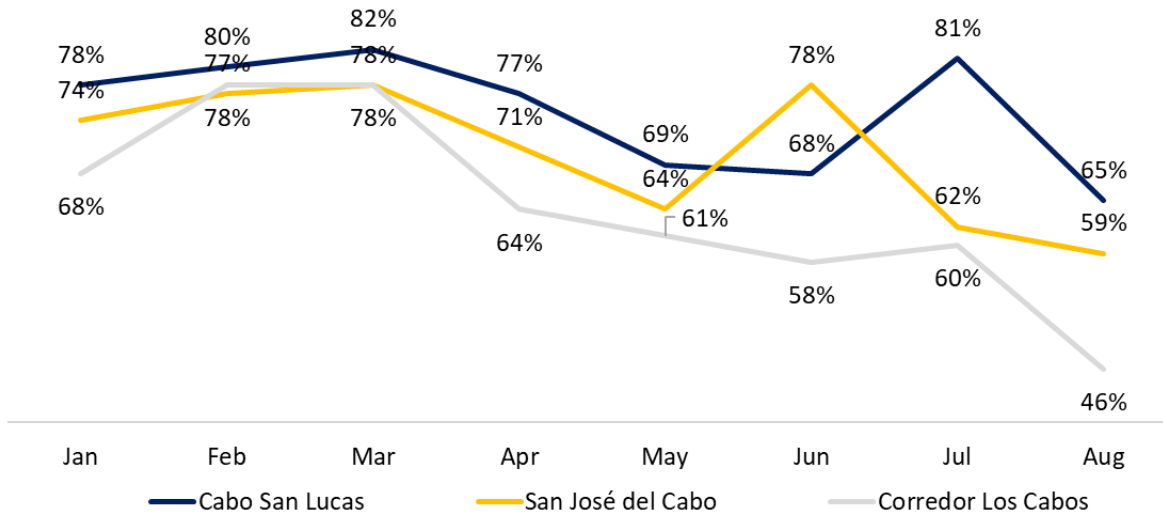
LOS CABOS  
TOURISM OBSERVATORY

HOTEL ACTIVITY

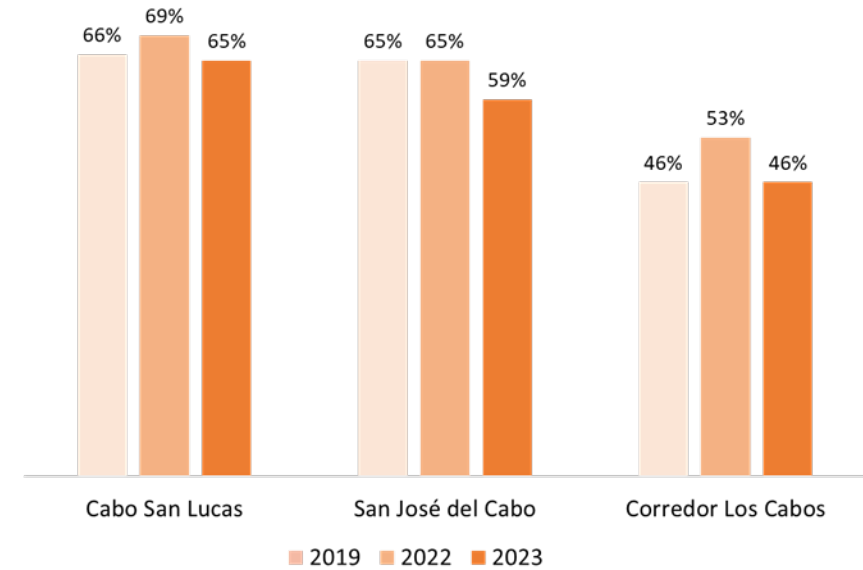


# Hotel Occupancy for Los Cabos and Sub-destinations (Aug-2023)

Hotel Occupancy, Monthly (2023)



Hotel Occupancy, Jun (2019-2023)



SOURCE: AHLIC

Cabo San Lucas:  
(Ago-2023):

**65%**



-4pp vs Ago-2022

San José del Cabo:  
(Ago-2023)

**59%**



-6 pp vs Ago-2022

El Corredor:  
(Ago-2023)

**46%**



-7% vs Ago-2022

# Hotel Activity (Jul-2023)

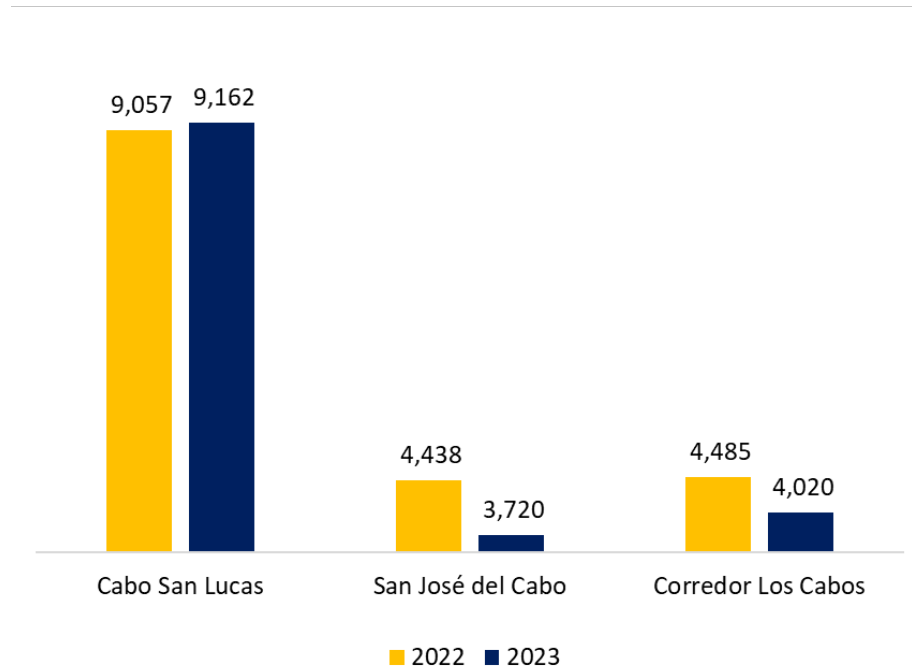
## Key Indicators (Jul-2023)

Cabo San Lucas  
(Supply)  
**9,162 rooms**  
(+1.2% vs Jul-2022) ↑

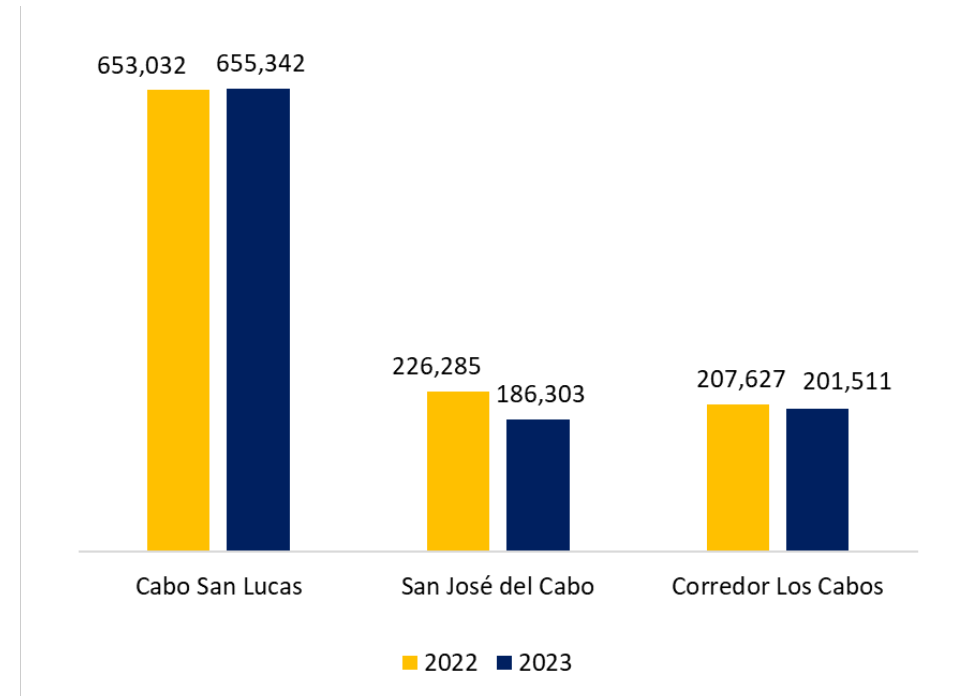
San José del Cabo  
(Supply)  
**3,720 rooms**  
(-16.2% vs Jul-2022) ↓

El Corredor  
(Supply)  
**4,020 rooms**  
(-10.4% vs Jul-2022) ↓

### Available Rooms (2019-2022)



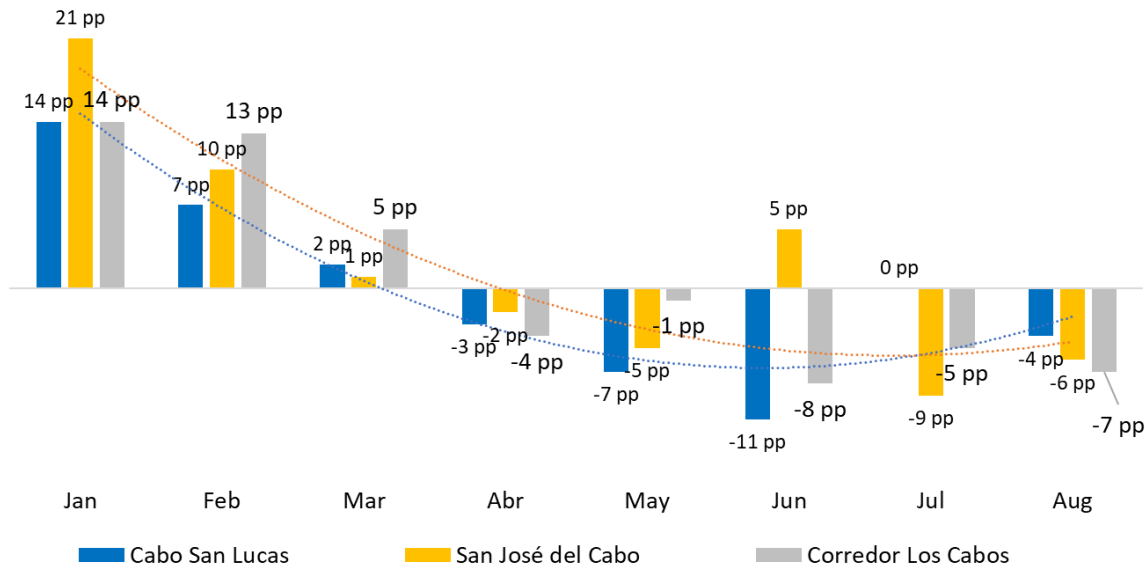
### Room Nights (2019-2022)



Source: DATATUR

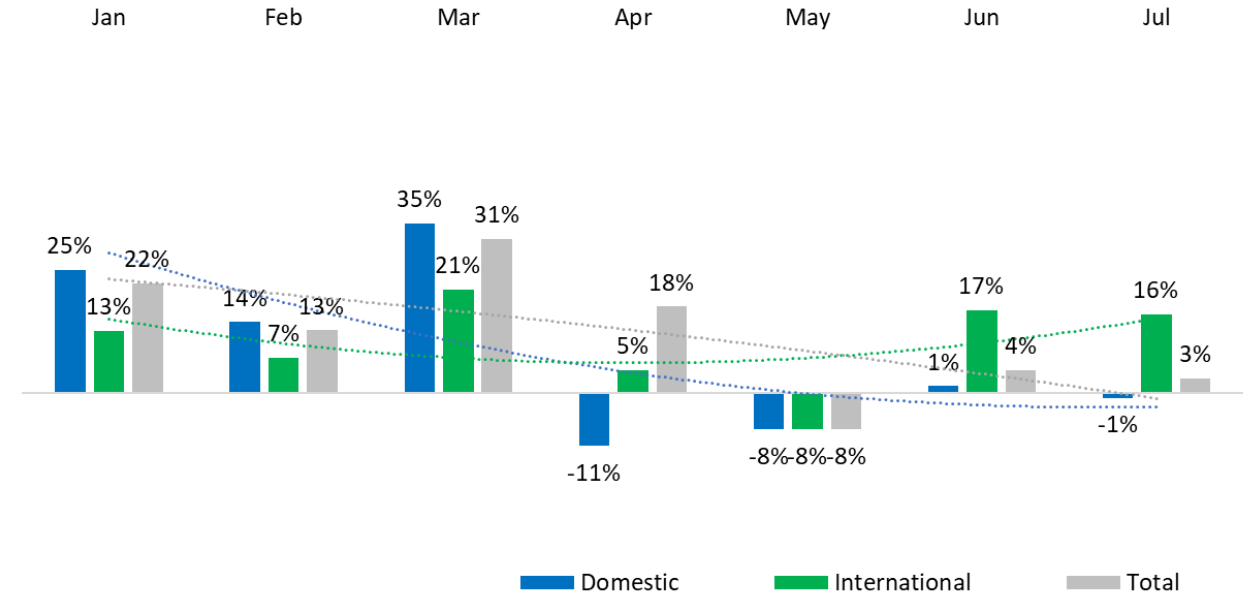
# Annual Variations in Hotel Occupancy and Tourist Arrivals

Annual Variation in Hotel Occupancy, by destination  
(2023 vs 2022)



SOURCE: AHLC

Annual Variation in Tourist Arrivals to Hotels, by Origin.  
(Jan-Jul-23, vs. 2022)



SOURCE: DATATUR

# Average Daily Rate and RevPAR (Aug-2023)

## Key Indicators (Aug-2023)

ADR (Los Cabos)

**\$390**

(-2% vs Aug-2022)



ADR (Cabo San Lucas)

**\$267**

(+0% vs Aug-2022)



ADR (San José del Cabo)

**\$266**

(-11% vs Jul Aug-2022)



ADR (El Corredor)

**\$459**

(-28% vs Aug-2022)



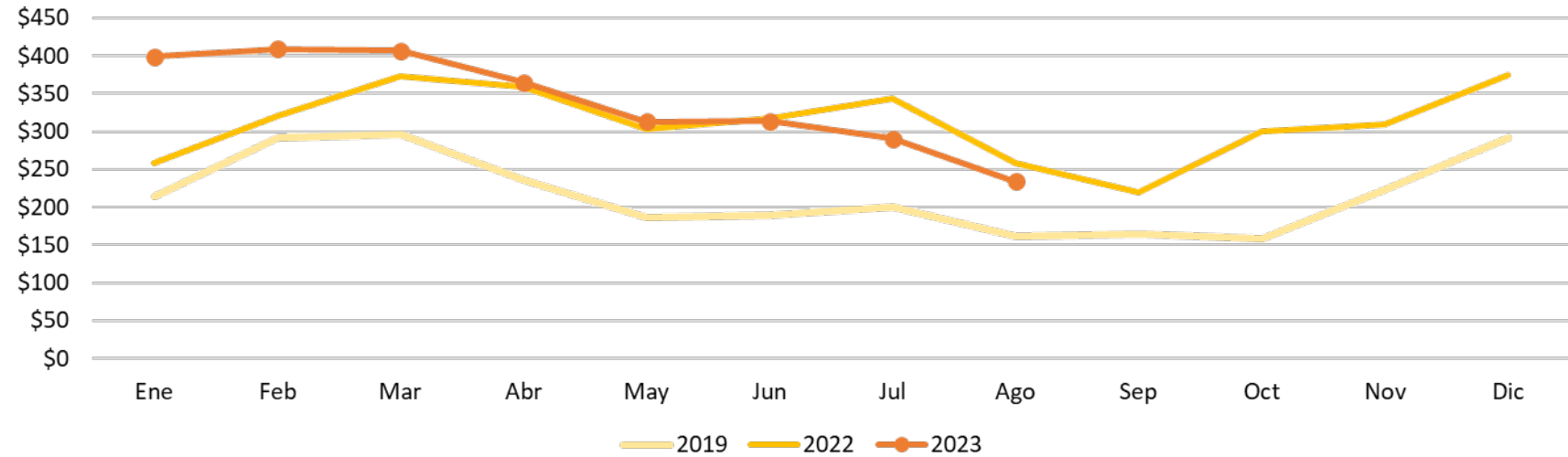
RevPAR (Los Cabos)

**\$234**

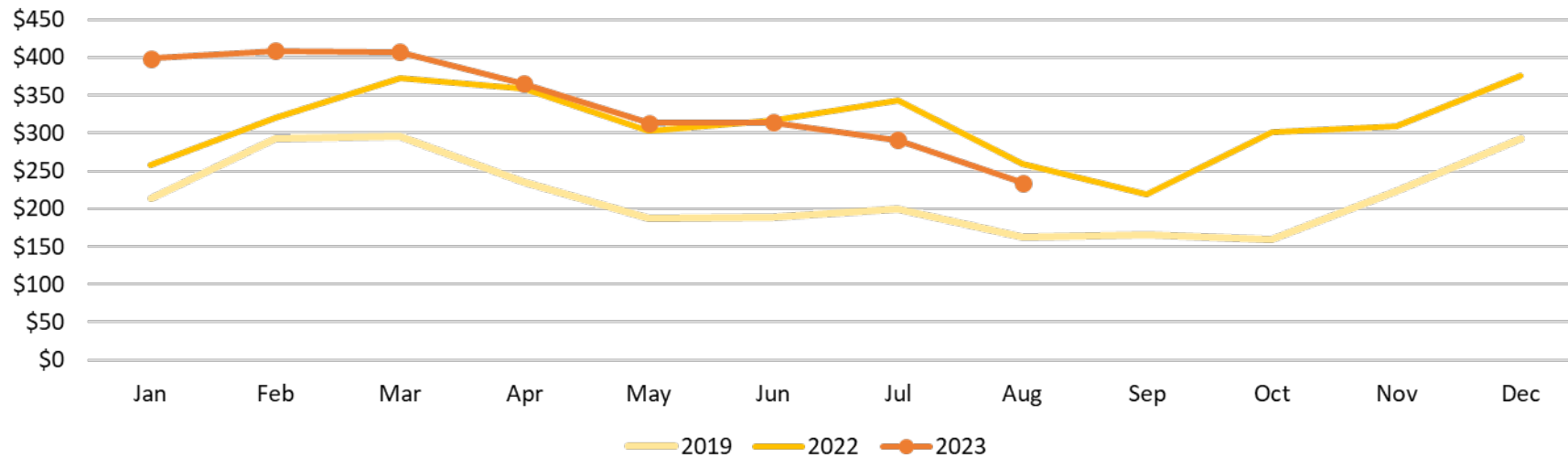
(-10% vs Aug-2022)



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



RevPAR, Los Cabos (USD, 2019 - 2022)



Source: AHLC

LOS  CABOS

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TOURISM OBSERVATORY

AIR TRAVEL CONNECTIVITY



# Key Indicators



Scheduled Air Seats  
(next 6 months):

**940 thousand**

(+2.8% vs 2022)



Scheduled Air Seats  
(Sep-2022):

**149 thousand**

(+0.8% vs Sep-2022)



CDMX:

**387.7 thousand**

(-7.7% vs 2022)



GDL:

**140.4 thousand**

(-23.8% vs 2022)



MTY:

**59.5 thousand**

(-3.8% vs 2022)



TIJ:

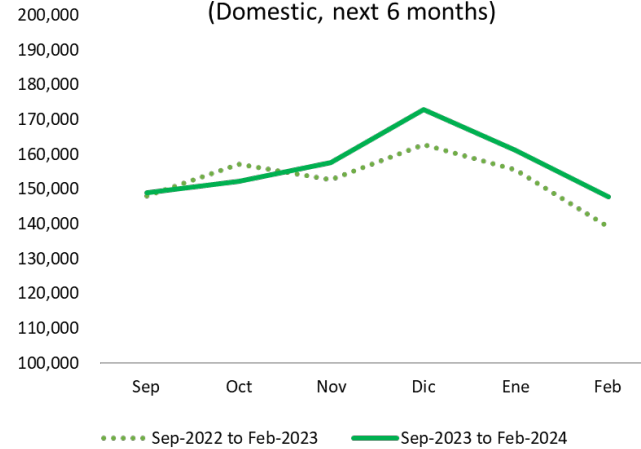
**159.5 thousand**

(+2.1% vs 2022)

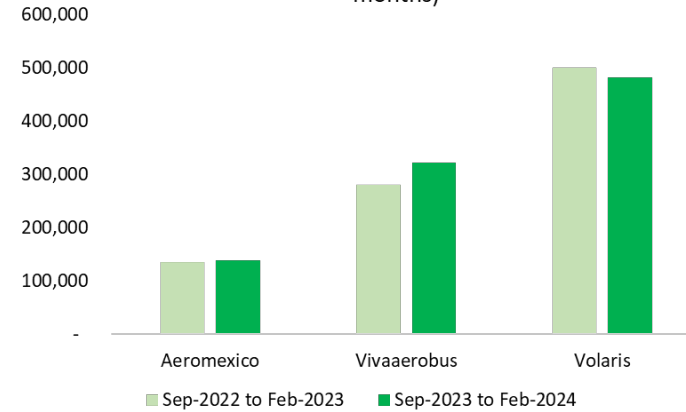


# Domestic Air Connectivity

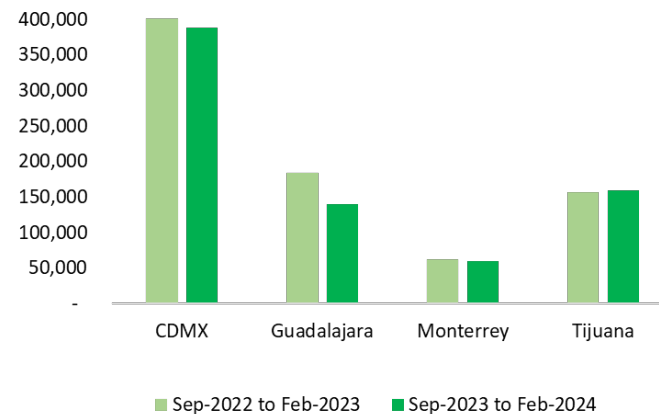
Flight Seat Scheduling to San Jose del Cabo  
(Domestic, next 6 months)



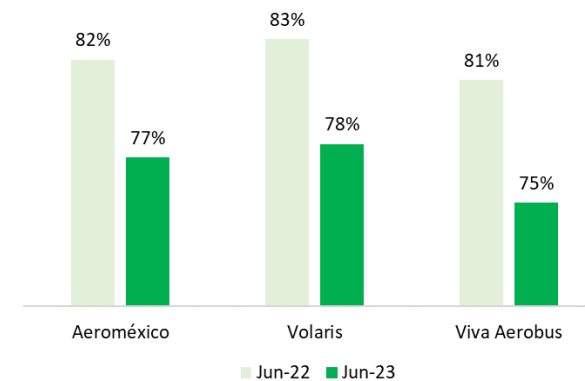
Flight Seat Scheduling per Airline (Domestic, next 6 months)



Flight Seat Scheduling per Departing Airport (Domestic, next 6 months)



Occupancy Factor of Domestic Airlines  
(Jun-2023)





## Key Indicators



Scheduled Air Seats  
(next 6 months):

**1.2 million**



(+5.5% vs 2022)

Scheduled Air Seats  
(Sep-2022):

**145.4 thousand**



(-5.6% vs Sep-2022)

LAX:

**213.7 thousand**



(-3.3% vs 2022)

HOU:

**115.1 thousand**



(-4.8% vs 2022)

DFW:

**155.5 thousand**



(+15.9% vs 2022)

PHX:

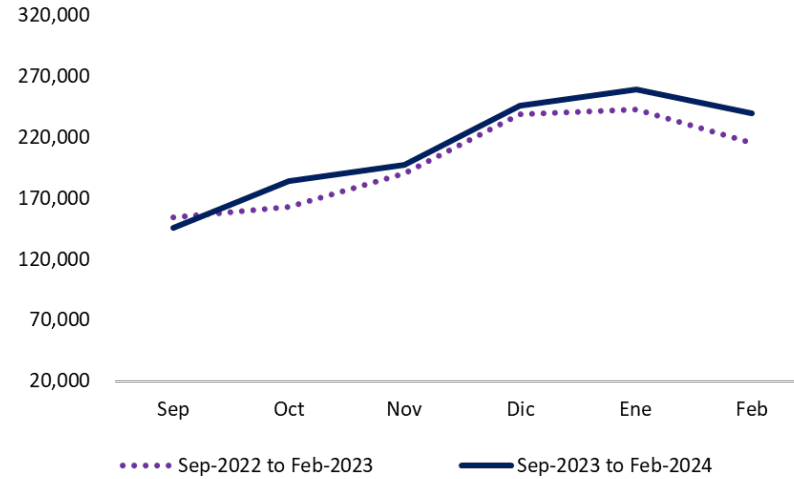
**135.2 thousand**



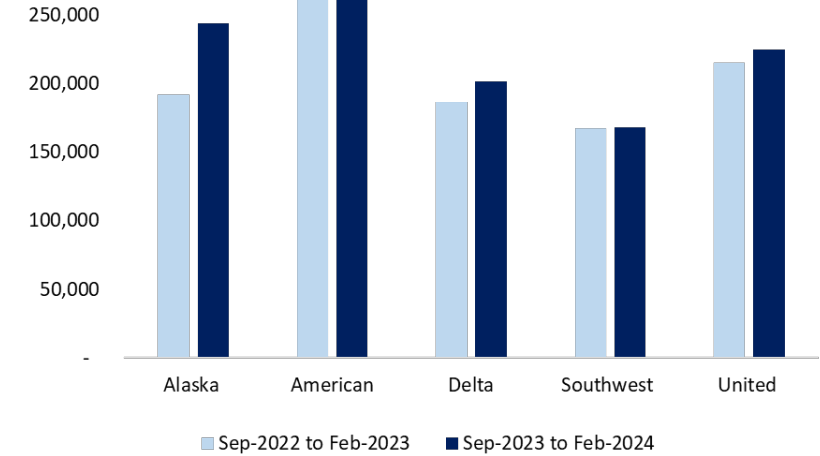
(-0.2% vs 2022)

# Air Connectivity: U.S.

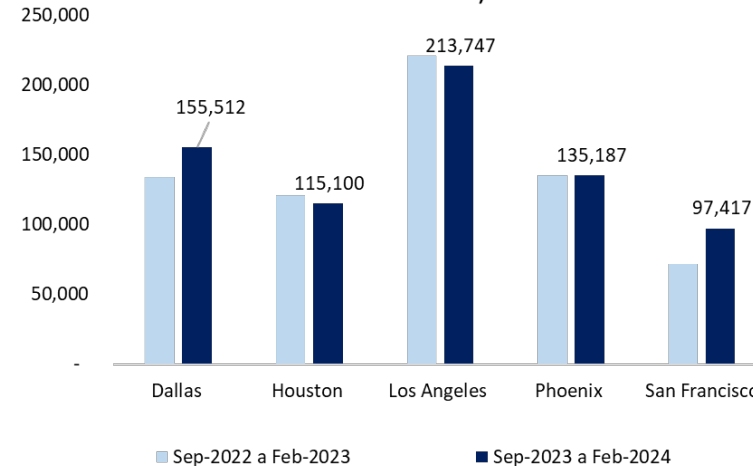
Flight Seat Scheduling to San Jose del Cabo  
(U.S., next 6 months)



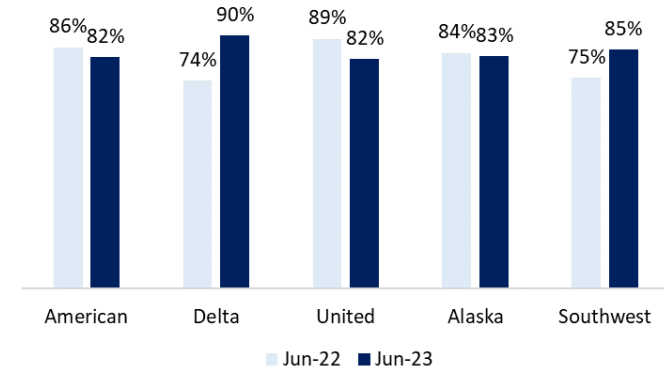
Flight Seat Scheduling per Airline (U.S., next 6 months)



Flight Seat Scheduling per departing airport (U.S., next 6 months)



Occupancy Factor of U.S. Airlines (Jun-2023)



# Air Connectivity: Canada

## Key Indicators



Scheduled Air Seats (next 6 months):

**128.6 thousand** ↓  
(-12.6% vs 2022)

Scheduled Air Seats (Sep-2022):

**5.8 thousand** ↑  
(+22% vs Sep-2022)

YYZ (Toronto):

**18.3 thousand** ↑  
(+1.6% vs 2022)

YVR (Vancouver):

**49.2 thousand** ↓  
(-12.6% vs 2022)

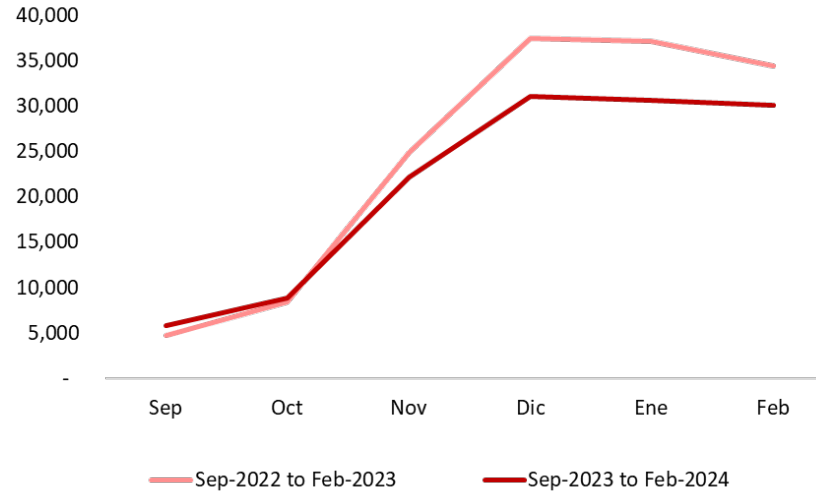
YYC (Calgary):

**34.2 thousand** ↓  
(-13.7% vs 2022)

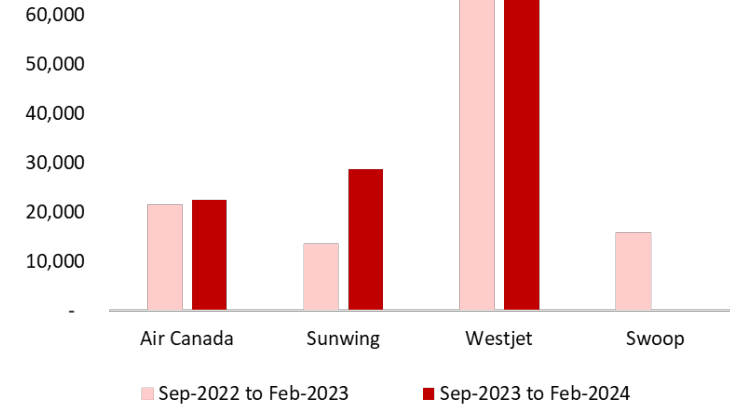
YYG (Edmonton):

**11 thousand** ↓  
(-17.9% vs 2022)

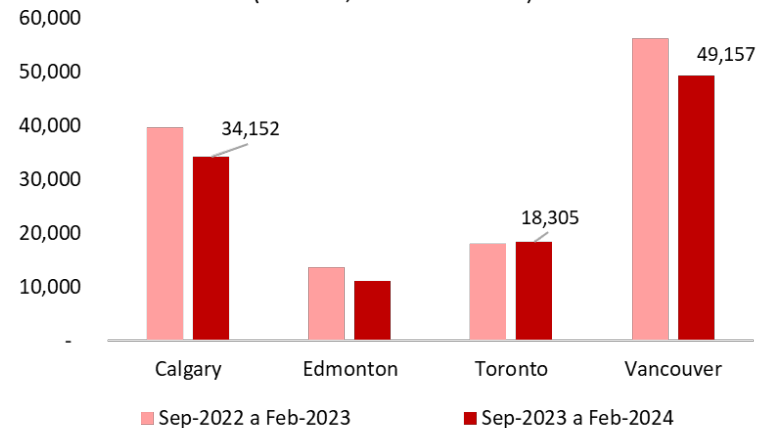
Flight Seat Scheduling to San Jose del Cabo (Canada, next 6 months)



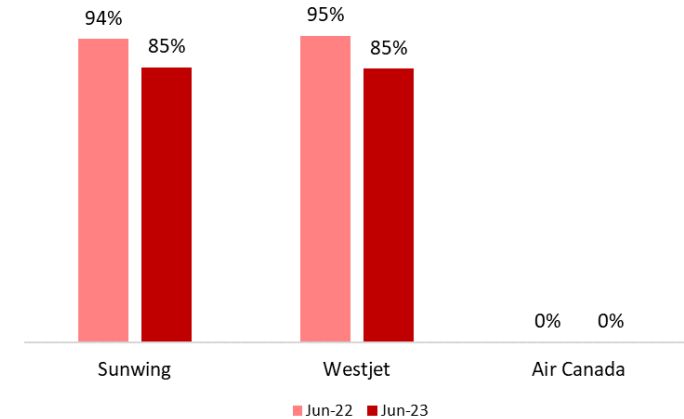
Flight Seat Scheduling per Airline (Canada, next 6 months)



Flight Seat Scheduling per departing airport (Canada, next 6 months)



Occupancy Factor of Canadian Airlines (Jun-2023)



LOS  CABOS

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PUBLIC RELATIONS



Key Indicators  
(Jul-2023)



Placements:  
**87**  
(+39% vs trailing 12-month average)



Reach:  
**2.7 million**  
(-14% vs trailing 12-month average)



# Public Relations: Placements and Reach (National)



SOURCE:  
LLORENTE Y CUENCA

Indicadores clave  
(Jul-2023)



Placements:

**5**

(-40% vs trailing 12-month average)



Reach:

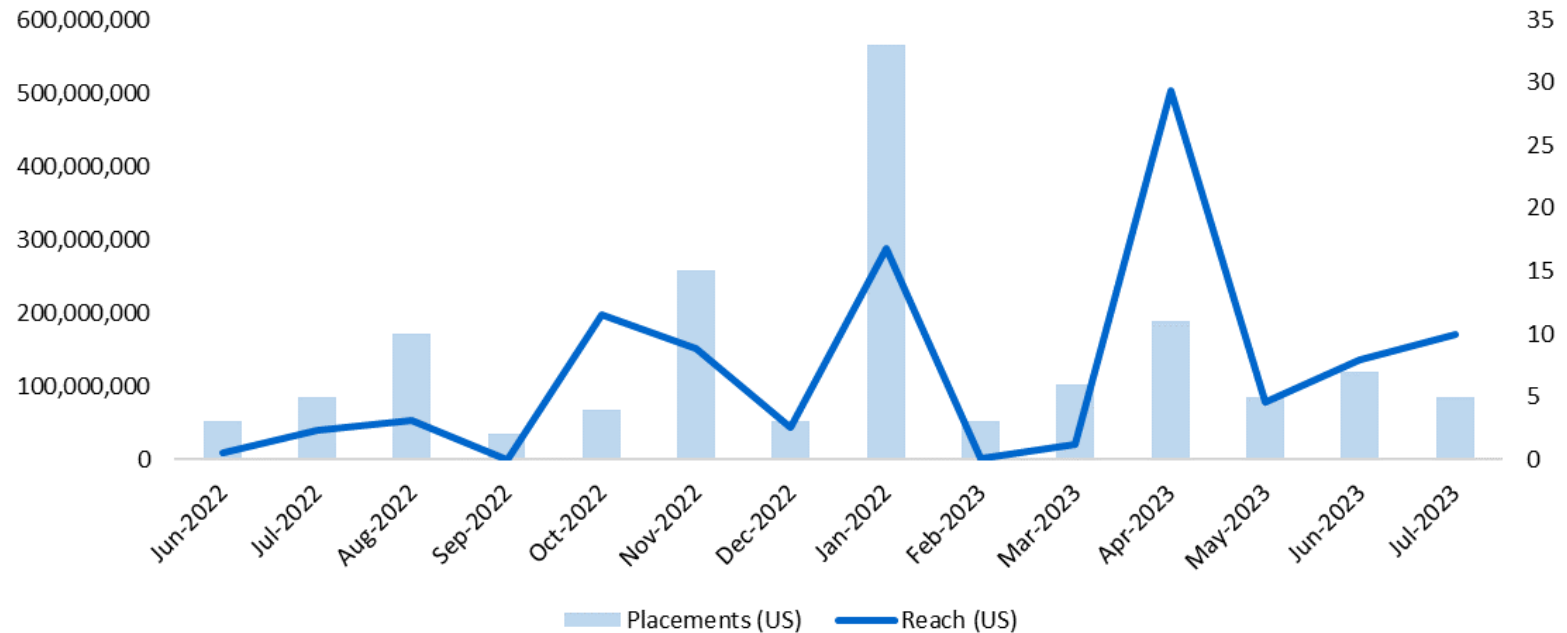
**169.7 million**



(+31% vs trailing 12-month average)

SOURCE:  
OGILVY

# Public Relations: Placements and Reach (U.S.)



Key Indicators  
(Jul-2023)



Placements:  
**8**  
(+39% vs trailing  
12-month average)

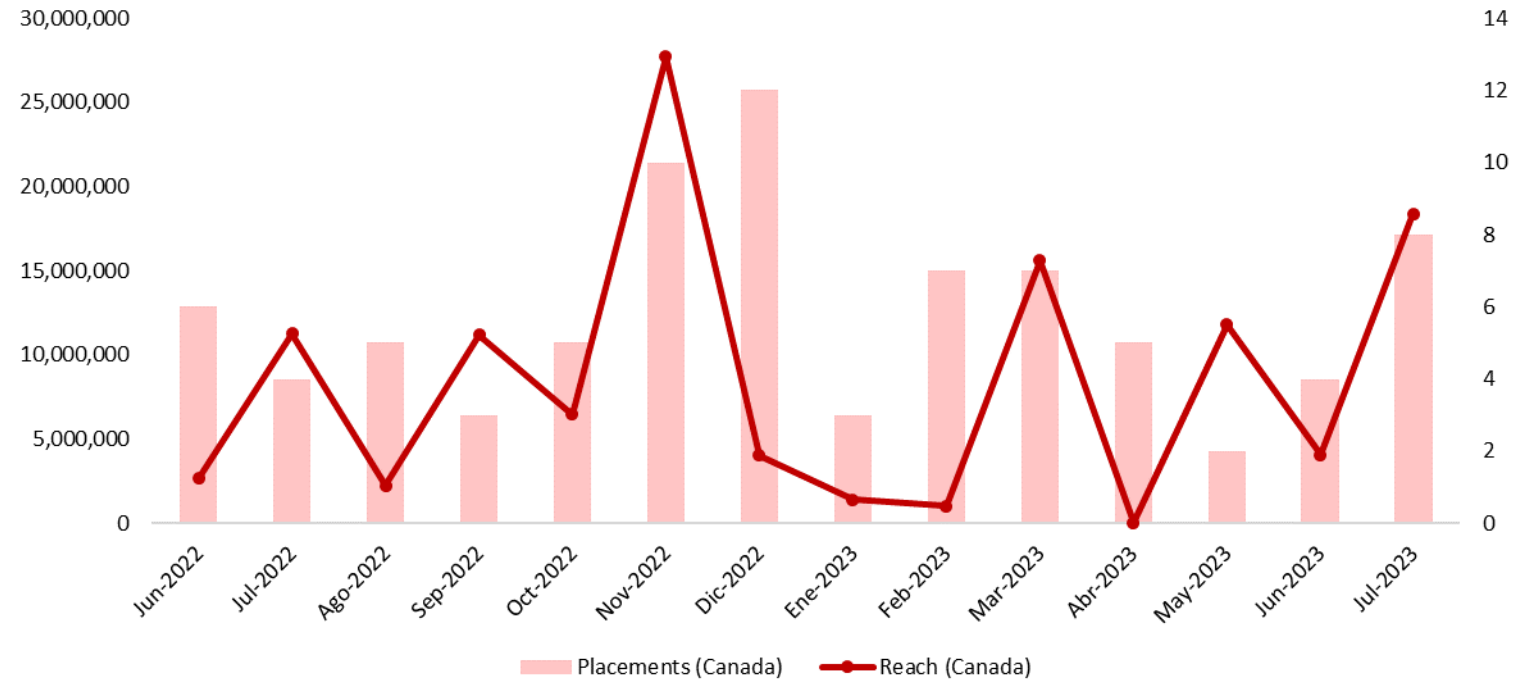


Reach:  
**18.4 million**  
(+108% vs trailing  
12-month average)



SOURCE:  
JESSON + CO

# Public Relations: Placements and Reach (Canada)



# Public Relations: Placements and Reach (Spain)

Indicadores clave  
(Jul-2023)



Placements:

**18**

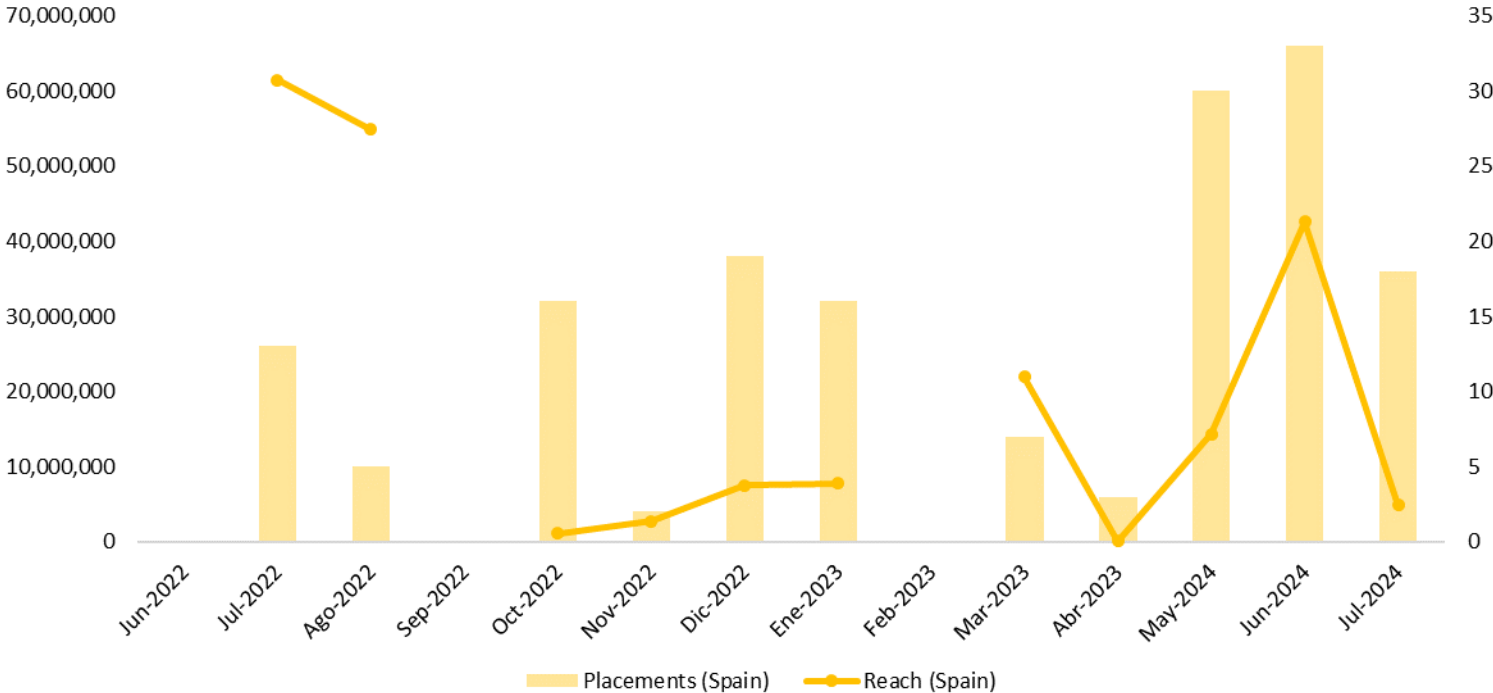
(+22% vs trailing  
12-month average)



Reach:

**4.9 million**

(-76% vs trailing  
12-month average)



FUENTE:  
ROMAN



# LOS CABOS TOURISM OBSERVATORY

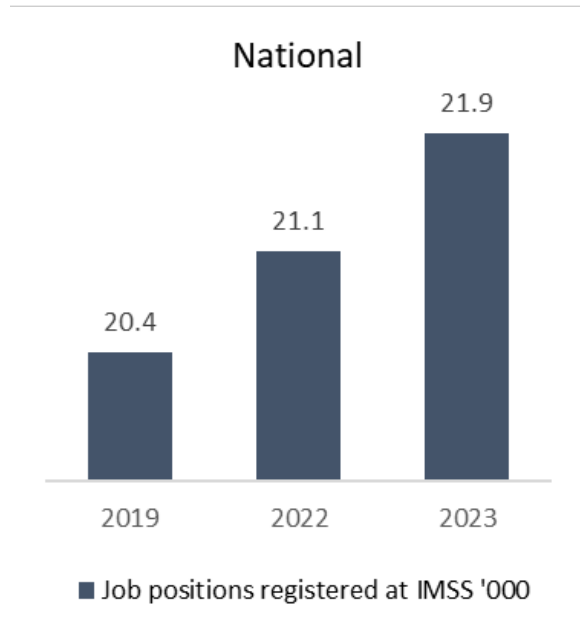
## COVID-19 IMPACT

Impacts on the Mexican tourism sector as a  
consequence of the COVID-19 pandemic.





# Impact on Employment in Mexico

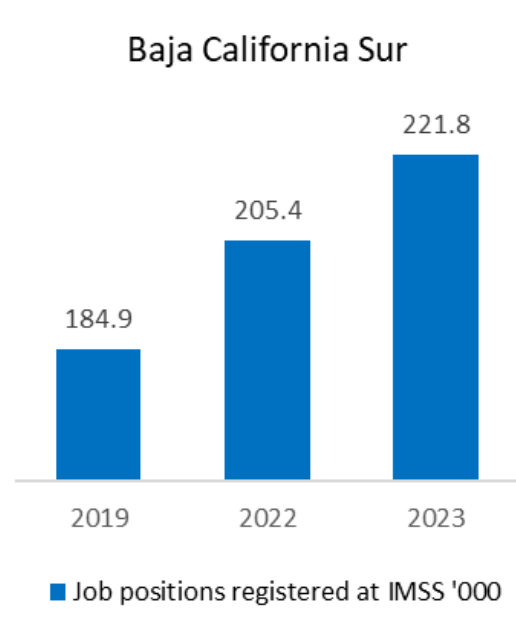


Employment (National):

**21.9 million**

**+3.8%**

vs Jul-2022

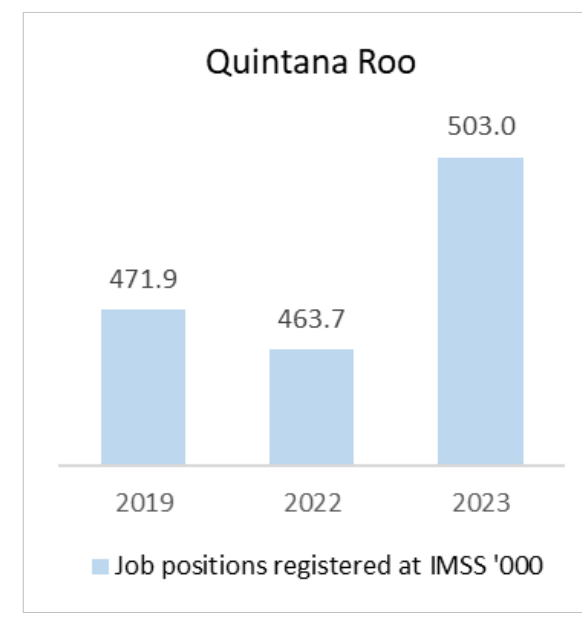


Employment (Baja California Sur):

**221.8 thousand**

**+8%**

vs Jul-2022



Employment (Quintana Roo):

**503.6 thousand**

**+8.5%**

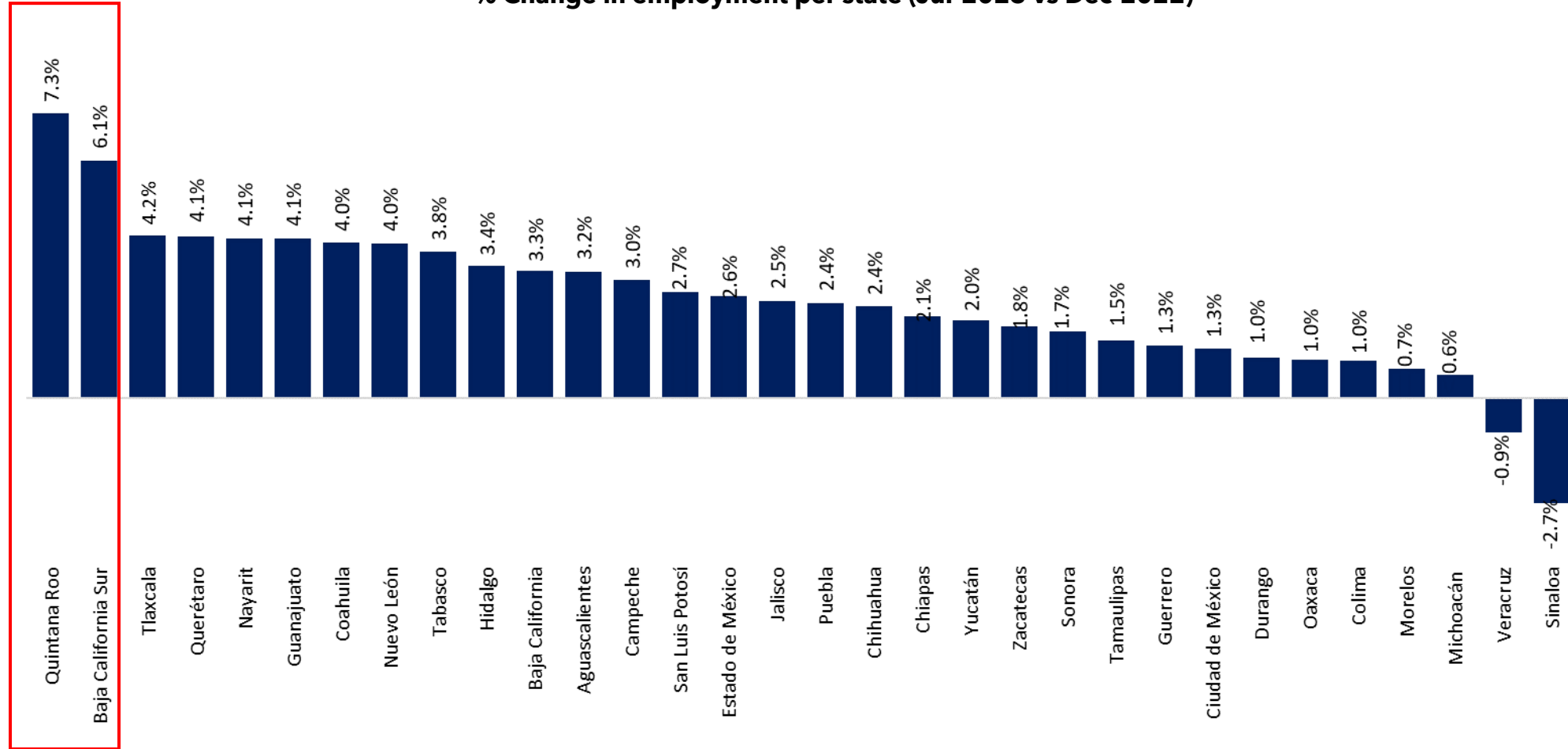
vs Jul-2022



SOURCE: IMSS

# Impact on Employment in Mexico

% Change in employment per state (Jul-2023 vs Dec-2022)

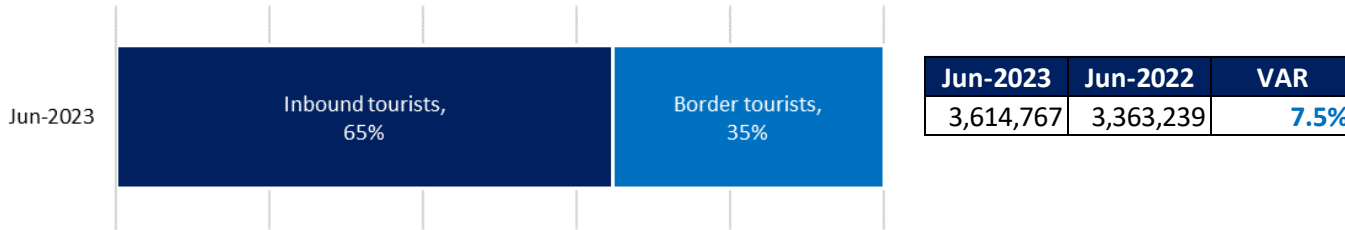


SOURCE : IMSS

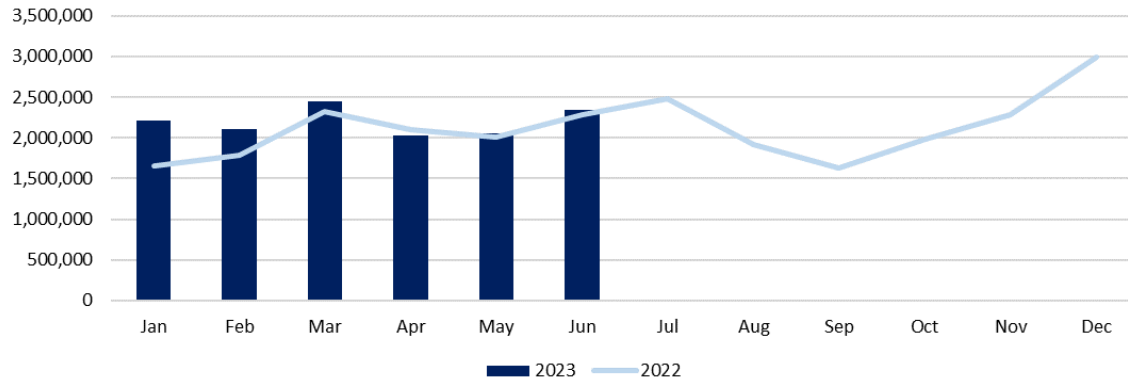
# International Tourist Arrivals in Mexico

# Air Activity in Mexico - Airport Groups

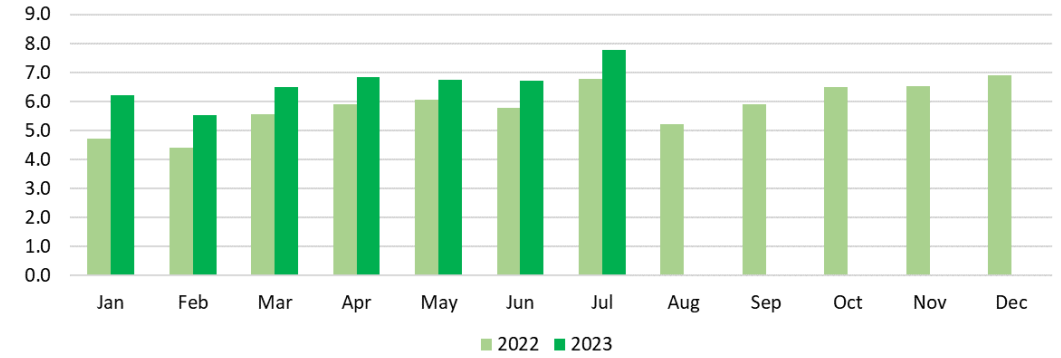
International Tourist Arrivals



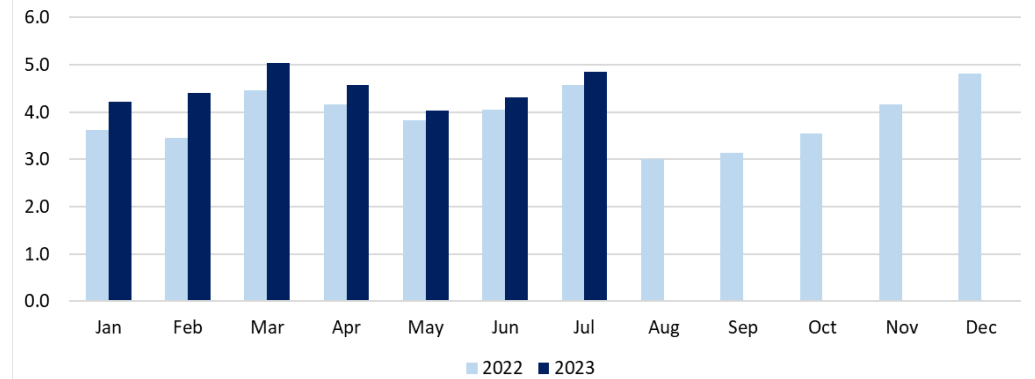
Inbound tourists



Passenger traffic in domestic operations (millions)



Passenger traffic in international operations (millions)



International tourist arrivals:

**3.61 million**

**+7.5%**

vs Jun-2022



International admittances:

**2.34 million**

**+2.3%**

vs Jun-2022



Average expenditure of inbound tourists by air:

**\$1,096 USD**

**-2%**

vs Jun-2022



PAX In domestic operations:

**7.8 million**

**+15%**

vs Jul-2022



PAX in international operations:

**4.85 million**

**+6%**

vs Jul-2022



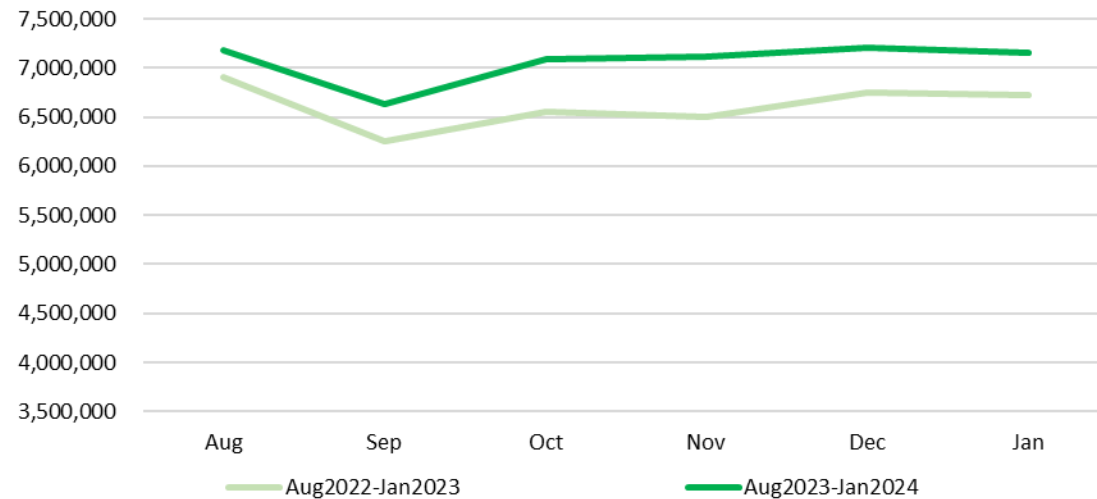
SOURCE : ASUR, OMA,GAP

SOURCE: INTERNATIONAL TOURIST SURVEY. INEGI

\*TOTAL TRAFFIC OF THE THREE AIRPORT GROUPS (ARRIVALS AND DEPARTURES), INFORMATION FROM MEXICO CITY IS NOT INCLUDED.

# Seat planning for Mexico (Aug-2023 and beyond)

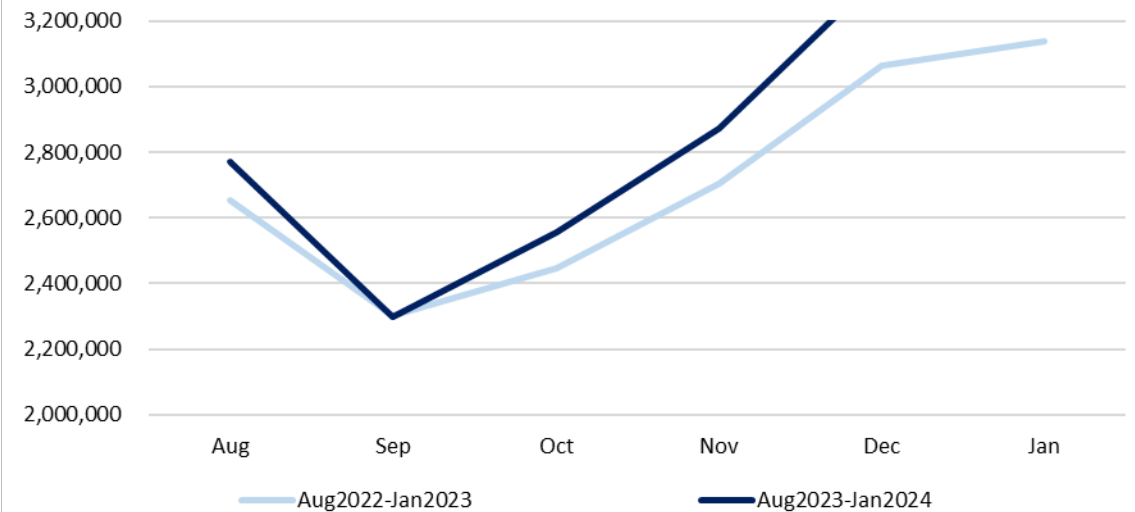
Seat planning. Domestic market.



**Domestic Seats:**  
**42.4 million**  
**+6.8%**  
 vs Ago-Ene 2022



Seat planning. International market to Mexico.



**International Seats:**  
**17.1 million**  
**+5%**  
 vs Ago-Ene 2022

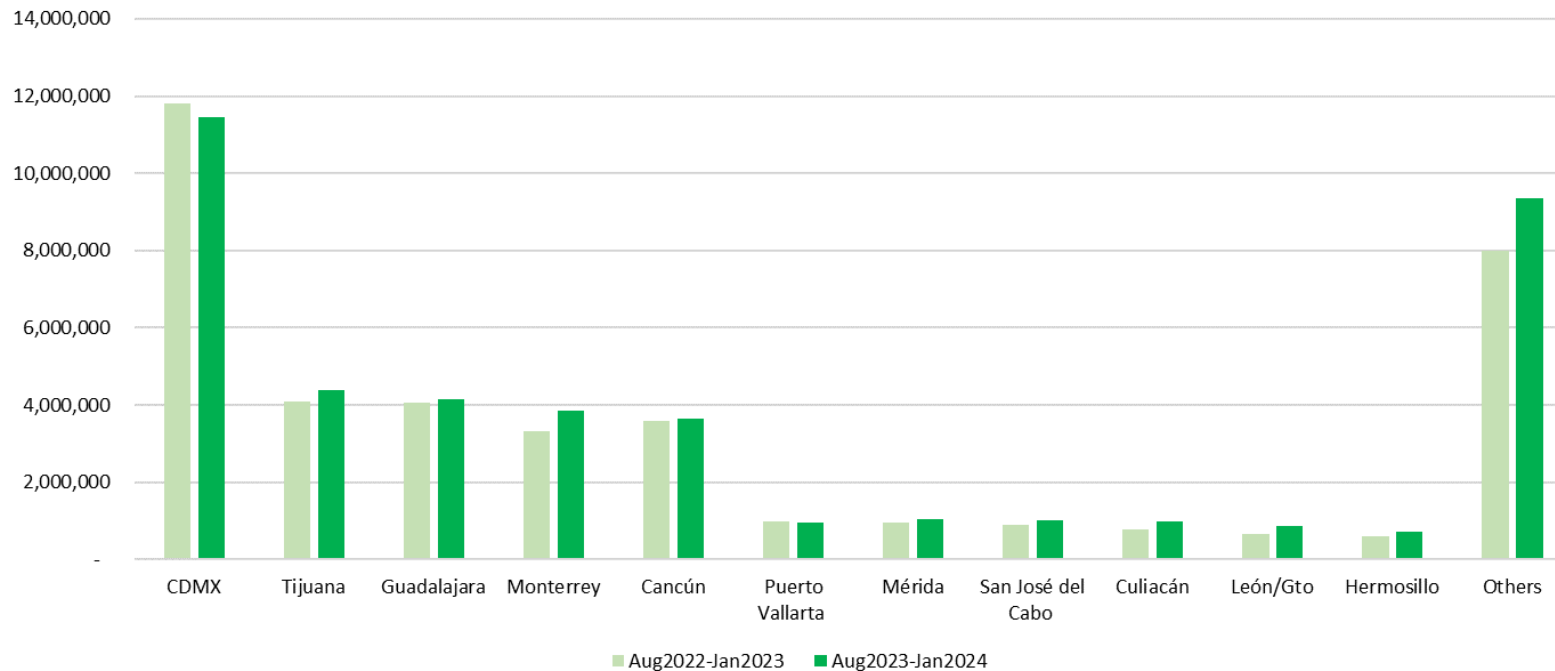


SOURCE : OAG

SEAT PLANNING AS OF THE LAST WEEK OF MAY 2022 AND 2023, RESPECTIVELY.

# Seat planning for Mexico

Seat planning by origin



**Domestic**  
(Aug2023-Jan2024):

**CDMX**   
**11.44 million**  
(-3.2% vs Aug2022-Jan2023)

**Tijuana:**   
**4.39 million**  
(+7.6% vs Aug2022-Jan2023)

**Guadalajara:**   
**4.14 million**  
(+2.0% vs Aug2022-Jan2023)

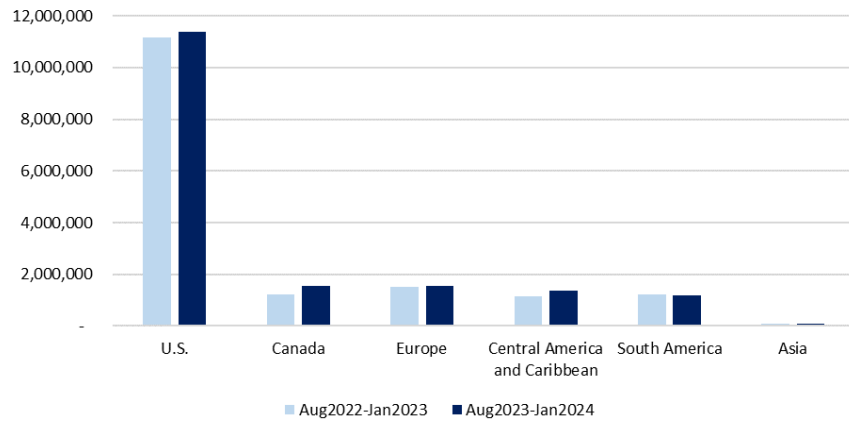
**San José del Cabo:**   
**1.02 million**  
(+13.6% vs Aug2022-Jan2023)

**SOURCE : OAG**

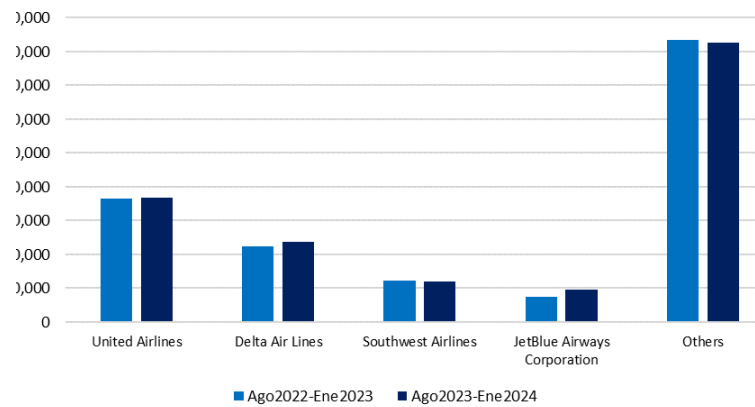
**SEAT PLANNING AS OF THE LAST WEEK OF MAY 2022 AND 2023, RESPECTIVELY.**

# Seat Planning for Mexico for the Coming Months

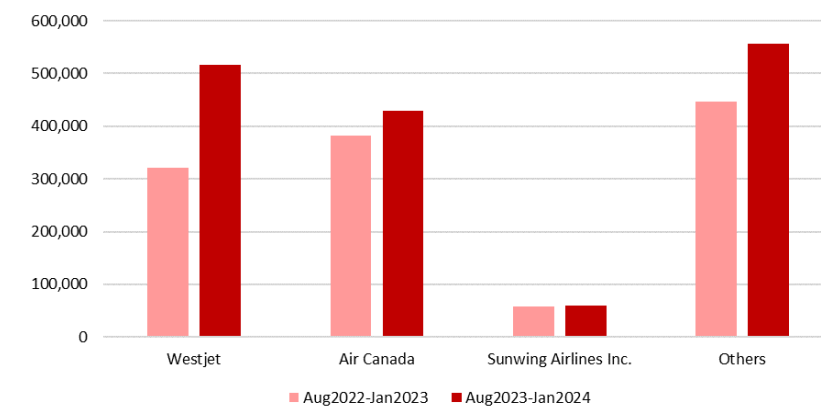
Seat planning. International market per region.



Seat planning per U.S. airline



Seat planning per Canadian airline.



**U.S.**  
**11.39 million seats**  
**+2.2%**

vs Aug-Jan 2022



**66.5%**

## %VAR planned seats

**Dallas:**  
**1.4 million**  
**-0.7%**

**Houston:**  
**1.5 million**  
**-3.6%**

vs Aug-Jan

**Los Angeles:**  
**1.4 million**  
**+11.5%**  
**Chicago:**  
**938 thousand**  
**+3.1%**



**Canada**  
**1.56 million**  
**+29.2%**

vs Aug-Jan 2022



**9.1%**

## %VAR planned seats

**Toronto:**  
**540 thousand**  
**+27.1%**  
**Vancouver:**  
**322 thousand**  
**+39.7%**

vs Aug-Jan 2022

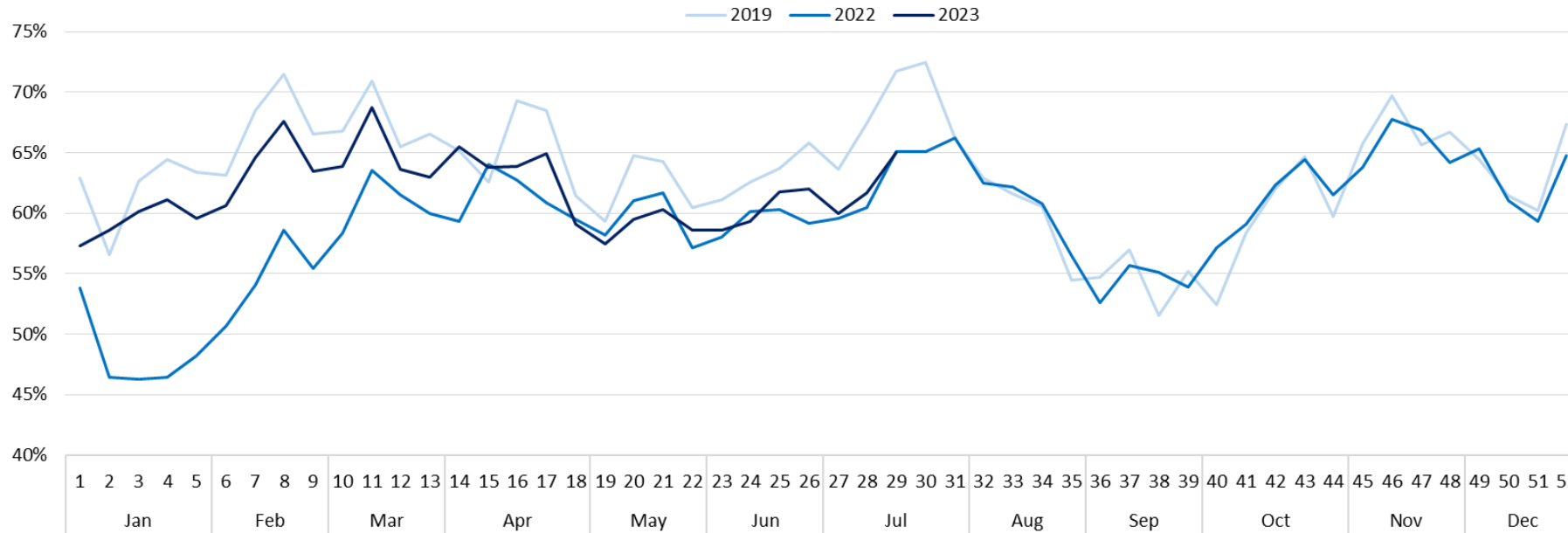
**Montreal:**  
**280 thousand**  
**+11.9%**  
**Calgary:**  
**201 thousand**  
**+26.8%**

**SOURCE : OAG**  
**SEAT PLANNING AS OF THE LAST WEEK OF MAY 2022 AND 2023, RESPECTIVELY.**

# Hotel Indicators in Mexico



Hotel occupancy in Mexico (average 12 resorts)

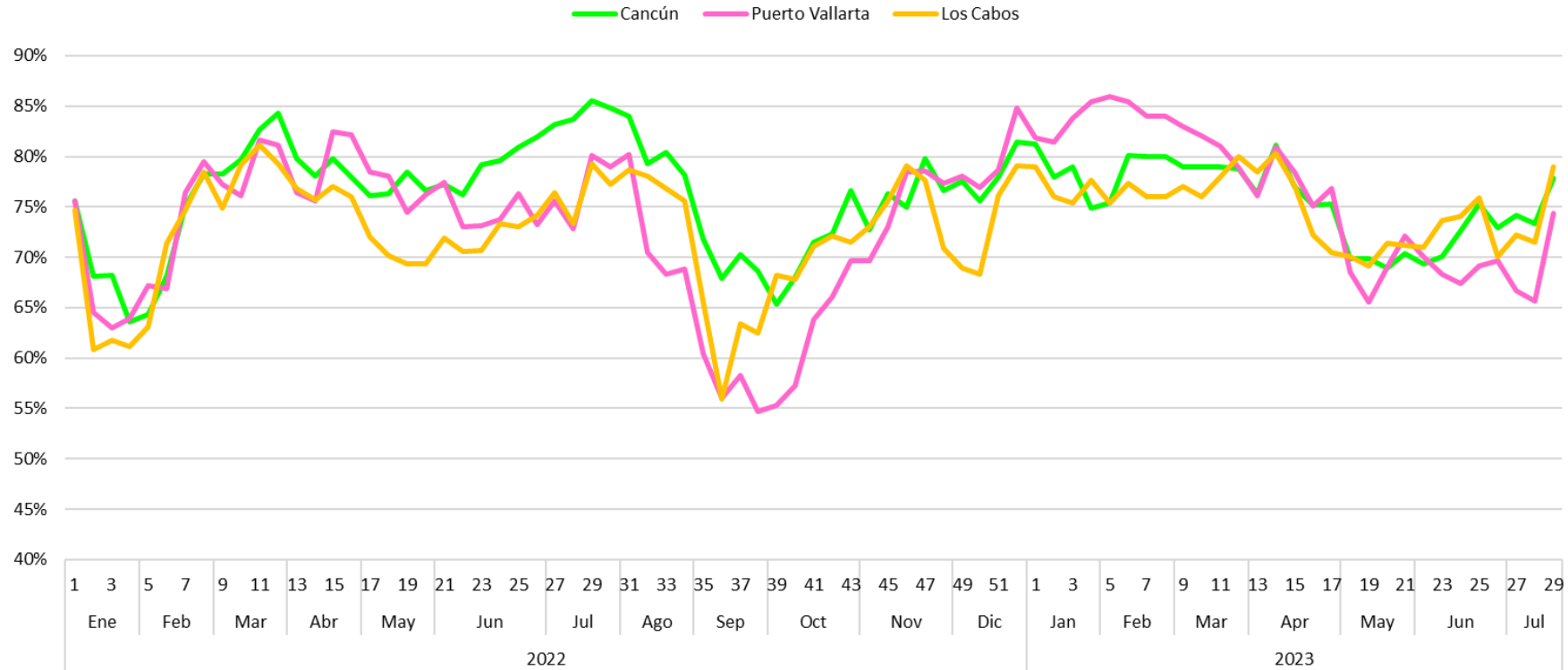


Average Occupancy,  
week 29  
**65%**  
**-0.1.pp**  
vs same week of 2022

**SOURCE : DATATUR.**  
**MONITORED DESTINATIONS: VILLAHEROMSA, AGUASCALIENTES, TUXTLA GUTIÉRREZ, QUERÉTARO, PUEBLA, PUERTO VALLARTA, SAN CRISTOBAL DE LAS CASAS, LOS CABOS, CANCÚN, CIUDAD DE MÉXICO, ACAPULCO Y SAN MIGUEL DE ALLENDE.**

# Hotel Indicators in Mexico

Hotel occupancy in Cancún, Puerto Vallarta and Los Cabos



**Cancún:**  
**77.8%**

**Puerto Vallarta:**  
**74.4%**

**Los Cabos:**  
**79%**  
**+1.2pp**    **+4.3pp**  
vs Cancún    vs Puerto Vallarta  
Week 29 (Jul 17-23) 2023

SOURCE : DATATUR



LOS  CABOS

LOS CABOS  
TOURISM OBSERVATORY

GLOSSARY



# Glossary

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- **Congress.** Non-business-oriented meetings in which large groups of individuals gather, generally to discuss and exchange points of view on a topic of interest. They usually have a duration of several days and simultaneous sessions, as well as a predefined multiannual or annual frequency.
- **Convention.** Trade or business meetings usually sponsored by a corporation, in which participants represent the same company, corporate group or customer or supplier relationships. Sometimes participation is mandatory and travel expenses are paid by the corporation. Includes those general and formal meetings of a legislative, social or economic body, in order to provide information, deliberate or establish consensus or address policies on the part of the participants, as well as to address business issues around a market, product or brand. They may contain a secondary exhibition component.
- **Rooms available.** The number of rooms in service. It does not include rooms that are out of service due to repairs or any other cause.
- **Tourist destination.** The primary destination of a tourist trip that is fundamental to the decision to make the trip. See also main reason for a tourist trip.
- **Seasonality.** Means that tourist flows tend to concentrate around certain times of the year, repeating this process annually.
- **Length of stay.** It is the result of dividing the total number of overnight tourists by the number of tourist arrivals per month. The result obtained expresses the number of days of stay of the tourist.
- **Events or incentive trips.** Incentive travel is a modern management strategy focused on recognizing people who achieved or exceeded objectives commonly related to sales or productivity, targeting participants who demonstrate improved job performance with an extraordinary travel experience.
- **Room nights.** This is obtained from the daily record of the number of tourists occupying the establishment's rooms, by length of stay (number of nights spent in the establishment) and is classified according to their place of origin, into residents or non-residents.
- **Inflation.** Continuous and generalized growth in the prices of goods and services sold in an economy. It is the average growth rate from one period to another of the prices of a basket of goods and services.
- **Underlying inflation.** It is the increase in prices of a subset of the CPI (National Consumer Price Index), which contains the least volatile items. It measures the inflation trend in the medium term. The 283 generic concepts that make up the CPI basket of goods and services are classified or grouped into subsets that respond to particular needs of analysis, among the best-known classifications are by object of expenditure, that which refers to the sector of origin of goods and services, and that of durability of goods and underlying inflation.
- **Passenger arrivals.** Passengers transported on airline aircraft with established routes and itineraries.
- **Tourist arrivals.** Corresponds to the number of tourists registered by the establishment during the month.

# Glossary

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- **Nationality of a visitor.** That of the country issuing the passport or other identity document, even if they habitually reside in another country.
- **Non-Resident.** A person whose usual place of residence is outside Mexican territory and who visits Mexico for a period of less than twelve months for any reason (business, vacations and others). Excluded if remuneration is received for the activities carried out in the place visited.
- **Hotel occupancy.** The occupancy rate of accommodations is a concept based on supply. It is an important indicator for many purposes. It provides information on the differences in utilization among the various types of lodging establishments. It also indicates the seasonal pattern for tourist accommodations.
- **RevPAR.** RevPAR is the most important metric used in the hotel industry to assess the financial performance of an establishment or chain. It is an abbreviation of Revenue Per Available Room. It always refers to a specific period (weekly, monthly, yearly, etc.). One way to calculate RevPAR is through the formula:  $RevPAR = It / \Sigma Ht$ , where  $It$  is equal to the total revenue generated by rooms in a period  $t$ . and  $\Sigma Ht$  is equal to the total number of rooms available in a period  $t$ . That is, the rooms of the establishment or chain multiplied by the number of nights in period  $t$  minus the unavailable rooms.
- **Resident.** Individual whose usual environment is in Mexican territory.
- **Residence.** The place/country where the traveler has stayed for most of the previous year (12 months) or has stayed for a shorter period and expects to return within 12 months to live in that country.
- **Average daily rate** (commonly referred to as ADR) is a statistical unit that represents the average revenue per occupied room paid in each period. The ADR along with the occupancy of the property are the basis for the financial performance of the property. ADR is calculated by dividing room revenue by the number of rooms sold. House guest rooms (known as house use) and complimentary rooms (known as complementary) should be excluded from the denominator.
- **Tourist.** Any person traveling away from his or her usual location for a period of less than 12 months and for any reason, except persons engaged in activities that will generate income for them at the travel destination; refugees or migrant workers; diplomats; seasonal or border workers; or tourism employees.
- **Visitor.** Any person who travels away from his or her usual location for a period of less than 12 months for any reason, except persons who engage in activities that will generate income for them at the travel destination: refugees or migrant workers; diplomats; seasonal or border workers; tourism employees; or persons seeking to establish a new residence or employment.



## LOS CABOS TOURISM OBSERVATORY

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