LOS CABOS

TOURISM OBSERVATORY

KEY PERFORMANCE INDICATORS

JULY 2026



LOS CABOS
TOURISM OBSERVATORY

Executive Summary: Air Activity (Jun-2026)

Passenger Arrivals at Los Cabos Intl. Airport (Jun-2026)

Total Passengers (current month)

295.4 thousand

-9.7% YoY

Domestic Passengers (current month)

117.7 thousand

-1.9% YoY

International Passengers (current month)

177.7 thousand

-14.2% YoY

Total Passengers (YTD cumulative):

1.9 million

-5.2 % vs 2025

Domestic Passengers (YTD cumulative):

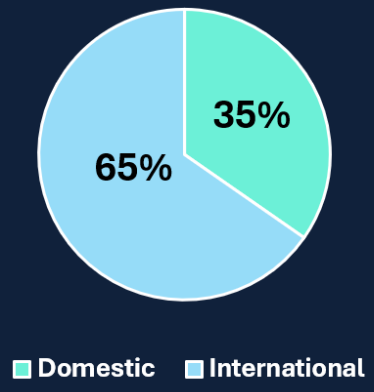
675.8 thousand

-4% vs 2025

International Passengers (YTD cumulative):

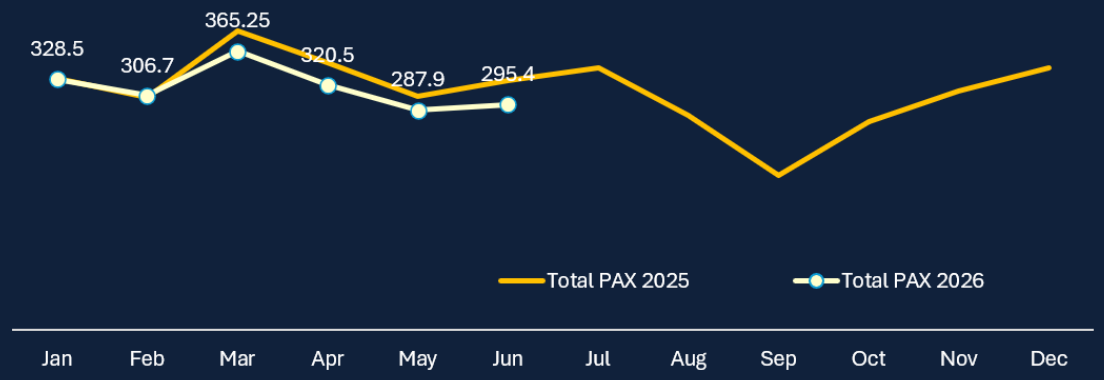
1.2 million

-5.8% vs 2025

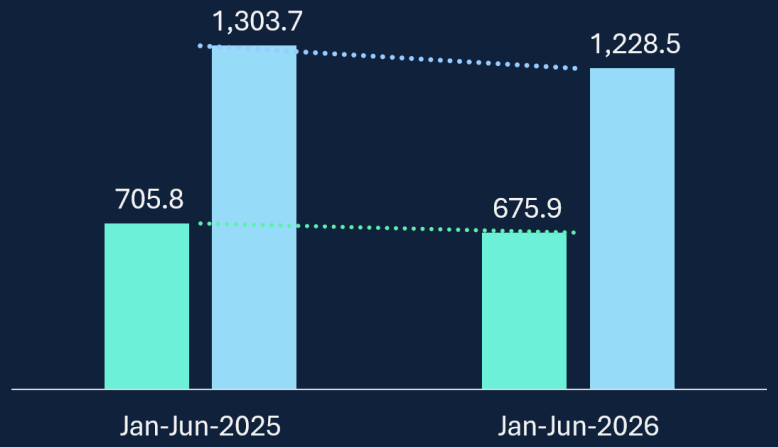


Source: GAP, note: 1

Air PAX Arrivals



Jan-Jun 2026 vs 2025



LOS CABOS
TOURISM OBSERVATORY

Executive Summary: Accommodation (Jun-2026)

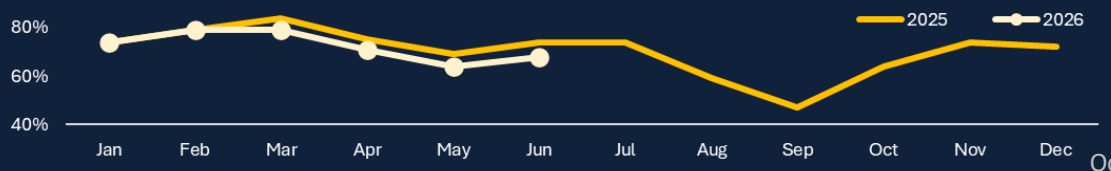
Hotel Industry (Jun-2026)

Source: AHLC; Note: 8

Occupancy (current month)
68%
-6 pp YoY

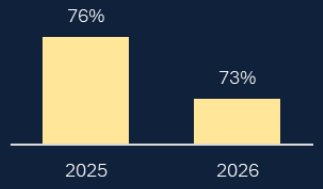
Average Daily Rate (current month)
$393
-2.7% YoY

RevPAR (current month)
$267
-10.7% YoY



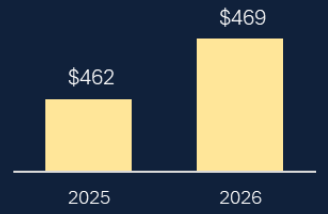
Monthly Occupancy

Occupancy (YTD average)
73%
-3.3pp vs 2025



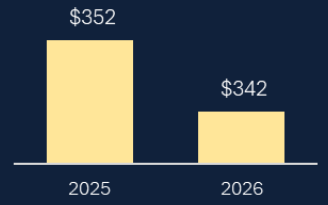
Annual Average Occupancy

Average Daily Rate (YTD average)
$469
+1.3% vs 2025



Annual ADR

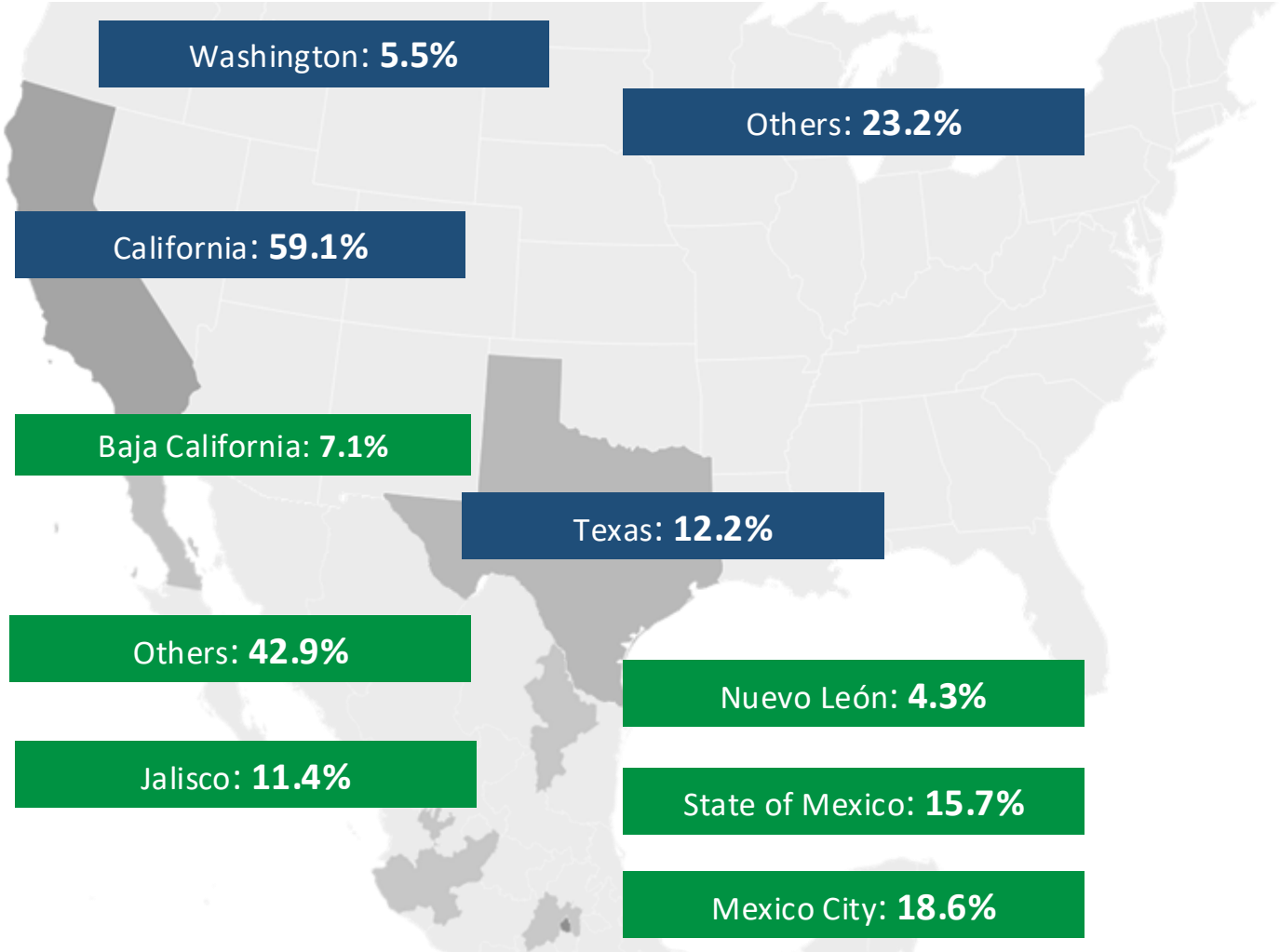
RevPAR (YTD average)
$342
-2.7% vs 2025



Annual Average RevPAR

LOS CABOS
TOURISM OBSERVATORY

Executive Summary: Market Share by Issuing Market (Jun-2026)



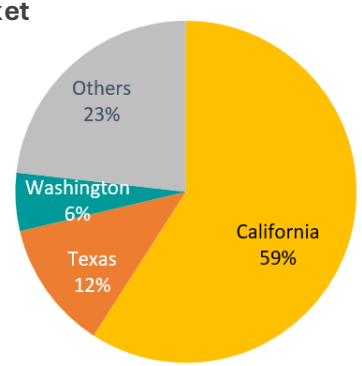
United States
57.2%
-2.8pp YoY

Canada:
0.8%
-3.2pp YoY

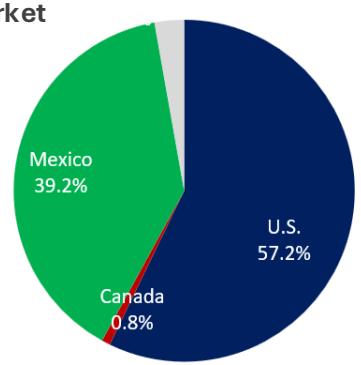
Domestic:
39.2%
+4pp YoY

Others:
2.8%
+2.0pp YoY

U.S. Market



Total Market



On the right side are 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.

Source: FITURCA (Tourist Surveys)

LOS CABOS

TOURISM OBSERVATORY

AIR TRAFFIC

PASSENGER ARRIVALS



LOS CABOS
TOURISM OBSERVATORY

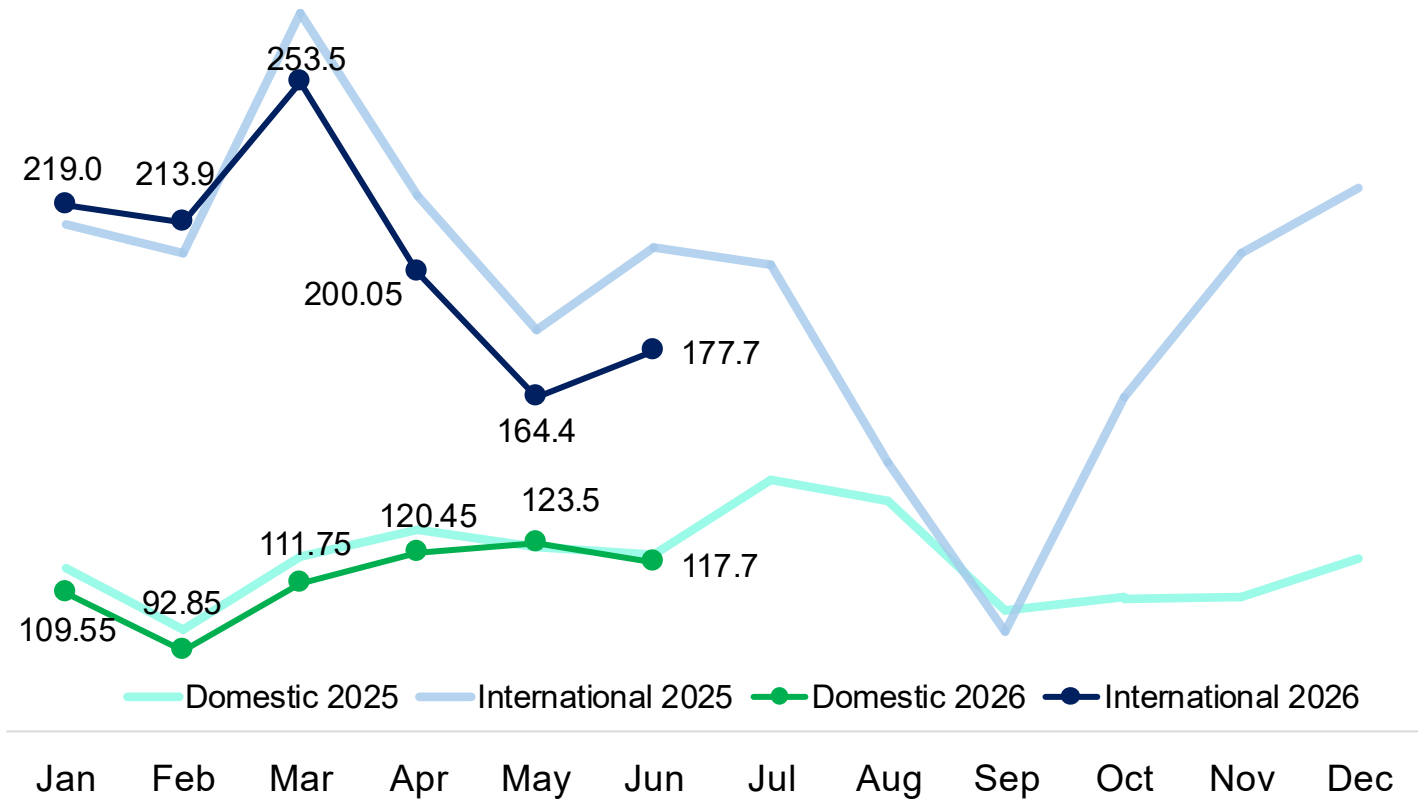
Passenger Arrivals at Los Cabos International Airport (SJD)

Results (thousand)
Jun 2026 vs
Jun 2025

Total Passengers
295.4
-9.7%

Domestic Passengers
(39.8% of total)
117.7
-1.9%

International Passengers
(60.2% of total)
177.7
-14.2%



Note: 1

Cumulative results (thousand)
Jan - Jun 2026 vs
Jan - Jun 2025:

Total passengers
1.9 million
-5.2%

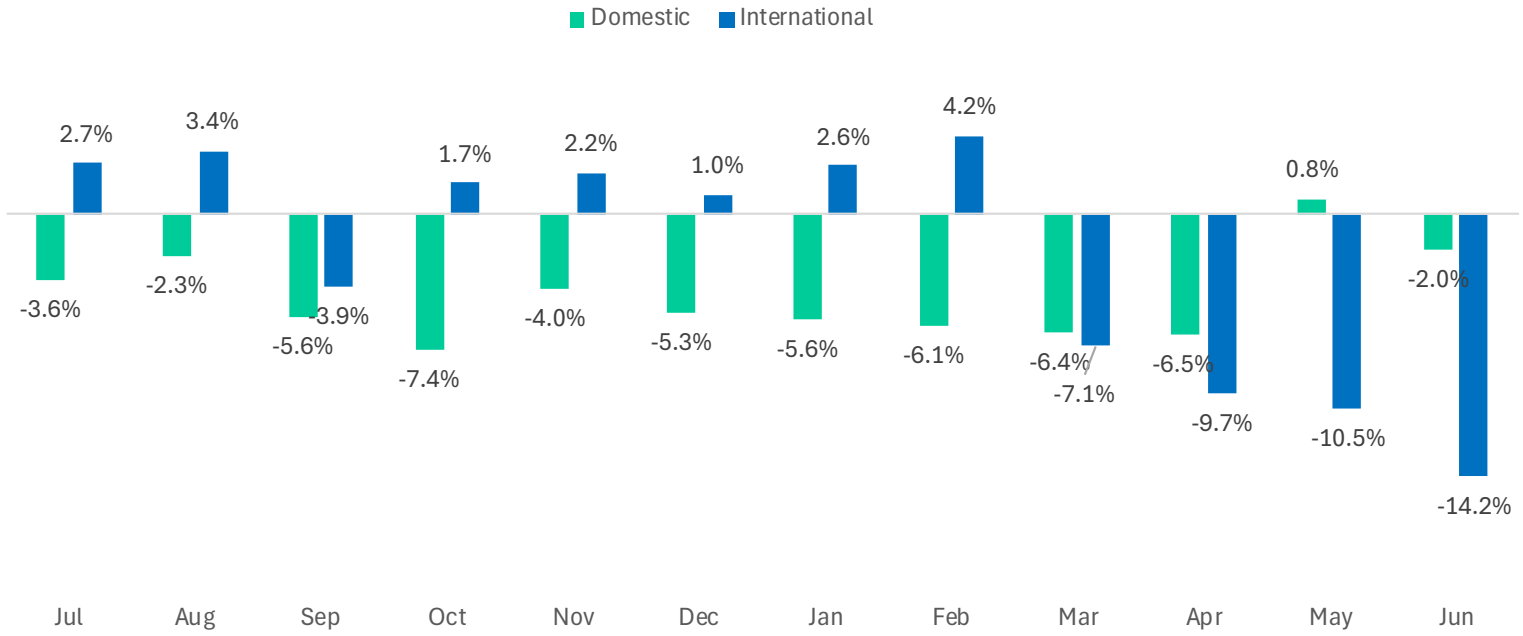
Domestic passengers
675.8
-4%

International passengers
1.2 million
-5.8%

Source: GAP

LOS CABOS
TOURISM OBSERVATORY

Passenger Arrivals at the Los Cabos International Airport (SJD), YoY Change



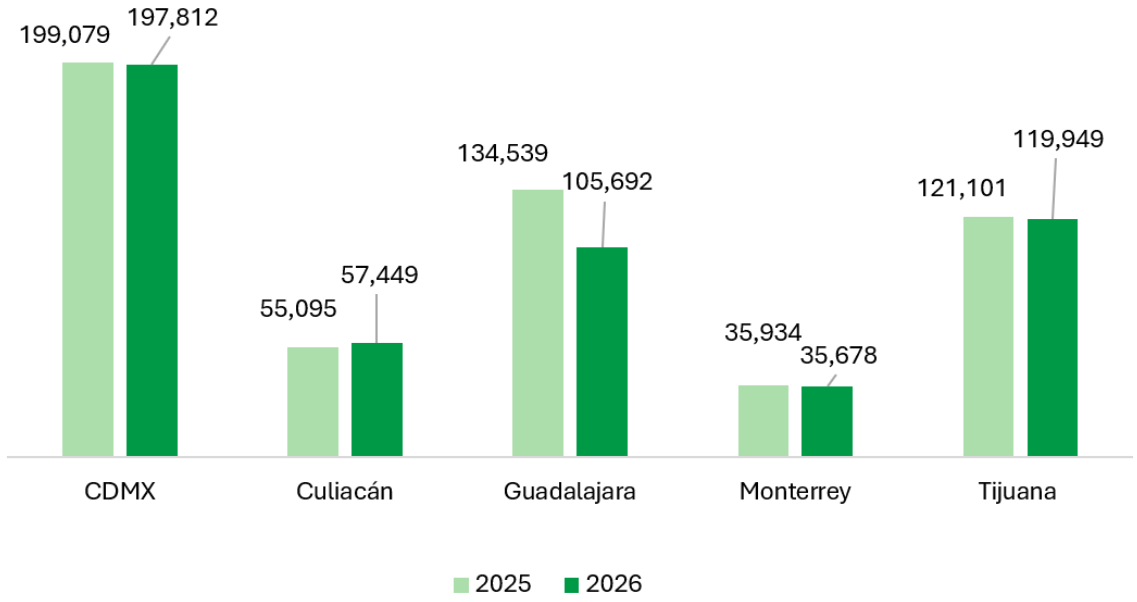
Note: 1

Source: GAP

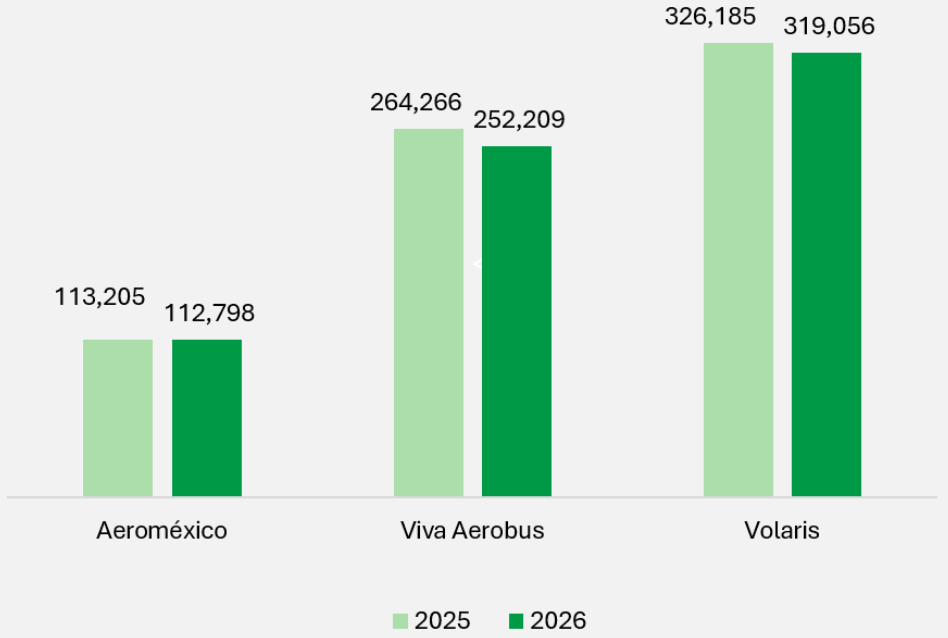
LOS CABOS
TOURISM OBSERVATORY

Cumulative Arrivals at Los Cabos International Airport, Domestic

Passenger arrivals on domestic flights to Los Cabos International airport, by origin



Passenger arrivals on domestic flights to Los Cabos International airport, by airline



Note: 1

Cumulative Results (thousands)
(Jan-Jun 2026 vs Jan-Jun 2025); Total Passengers

675.8 thousand
-4%

Distribution per Origin

CDMX	38.3%	+1.8 pp
GDL	20.5%	-4.2 pp
MTY	6.9%	+0.3 pp
TIJ	23.2%	+1.0 pp

Distribution per Airline

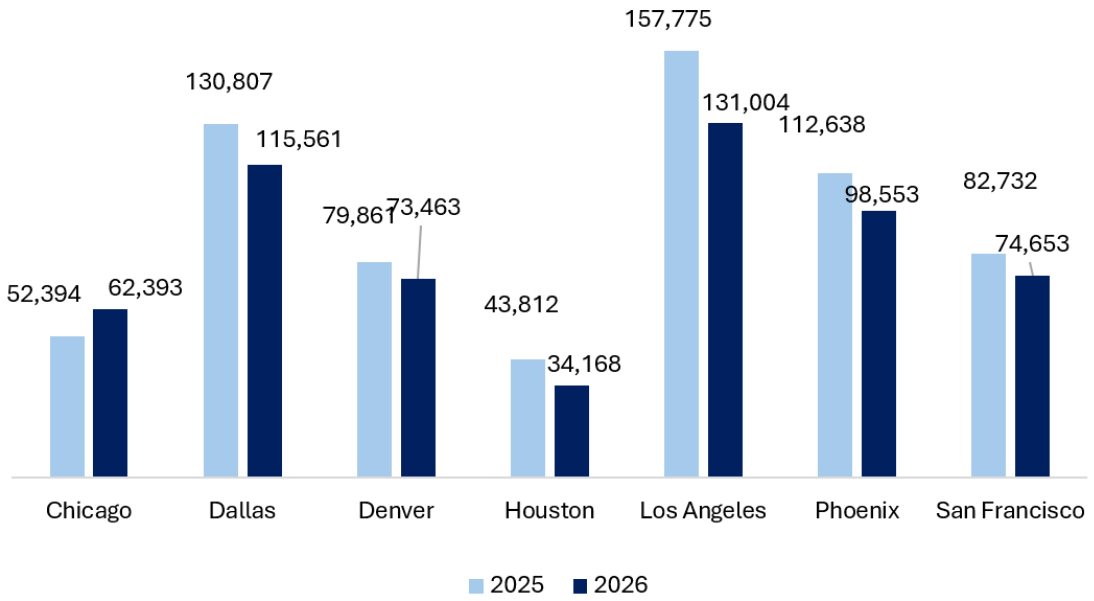
AM	16.3%	+0.4 pp
VIV	36.4%	-0.6 pp
VOL	46.1%	+0.4 pp

Source: GAP

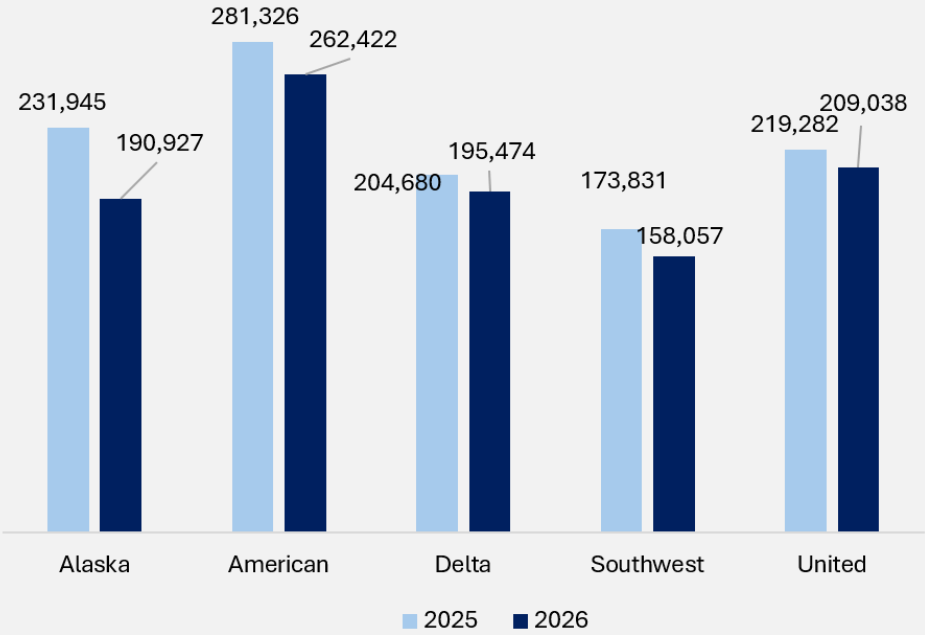
LOS CABOS
TOURISM OBSERVATORY

Cumulative Arrivals at Los Cabos International Airport, United States

Passenger arrivals on U.S. flights to Los Cabos International airport, by origin



Passenger arrivals on U.S. flights to Los Cabos International airport, by airline



Note: 1

Cumulative Results (thousands)
(Jan-Jun 2026 vs Jan-Jun 2025); Total Passengers

1,044.9

-8.9%

Distribution per Origin		
DFW	11.1%	-0.3 pp
LAX	12.5%	-1.2 pp
PHX	9.4%	-0.4 pp
SFO	7.1%	+0.1 pp

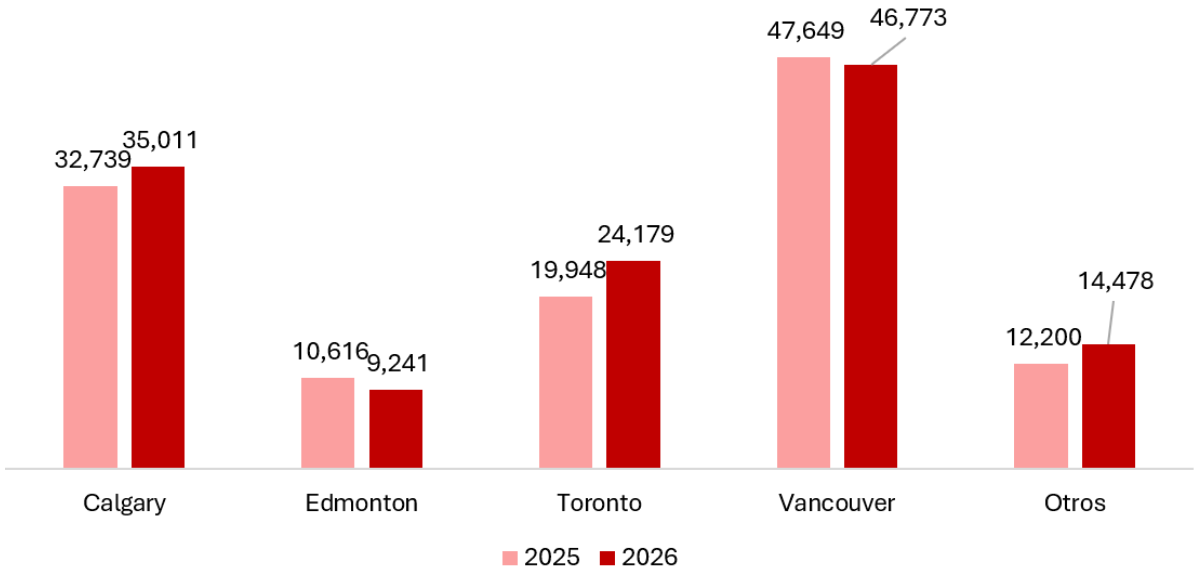
Distribution per Airline		
AS	18.3%	-2.0 pp
AA	25.1%	+0.6 pp
DL	18.7%	+0.9 pp
UA	20.0%	+0.9 pp

Source: GAP

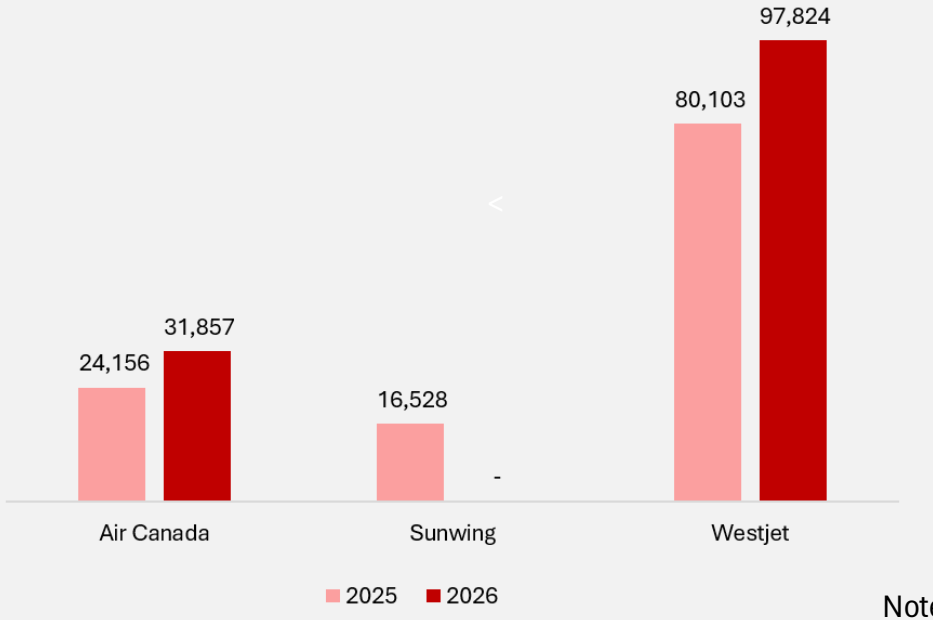
LOS CABOS
TOURISM OBSERVATORY

Cumulative Arrivals at Los Cabos International Airport, Canada

Passenger arrivals on Canadian flights to Los Cabos International airport, by origin



Passenger arrivals on Canadian flights to Los Cabos International airport, by airline



Note: 1

Cumulative Results (thousands)
(Jan-Jun 2026 vs Jan-Jun 2025); Total Passengers

129.7

5.3%

Distribution per Origin

YYC	27.0%	+0.4 pp
YEG	7.1%	-1.5 pp
YYZ	18.6%	+2.4 pp
YVR	36.1%	-2.6 pp

Distribution per Airline

AC	24.6%	+5.0 pp
WG	0.0%	-13.4 pp
WS	75.4%	+10.4 pp

Source: GAP

LOS CABOS

TOURISM OBSERVATORY

AIR TRAFFIC

TOURIST ADMISSIONS BY NATIONALITY



LOS CABOS
TOURISM OBSERVATORY

International Tourist Arrivals, by Nationality

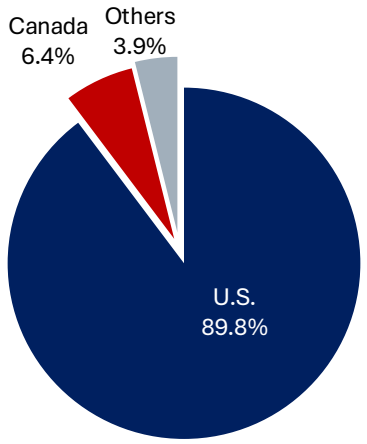
Results
May-2026 vs
May-2025

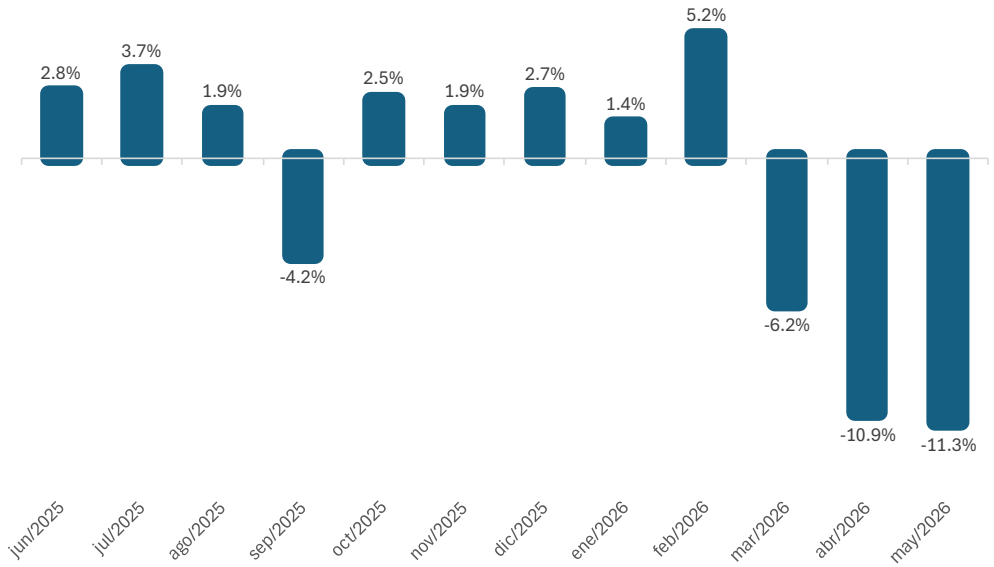
Total Tourists
162,821
-11.3%

U.S.
146,147
-12.7%

Canada
10,366
-5.5%

Rest
6,308
+19.3%





Note: 3

YTD Cumulative
Jan to May-2026 vs
Jan to May-2025

Total Tourists
1,026,491
-4.4%

U.S.
858,384
-6.6%

Canada
128,349
+7.1%

Rest
15,576
-10.9%

Source: INM-SIOM

LOS CABOS
TOURISM OBSERVATORY

International Tourist Arrivals, U.S.

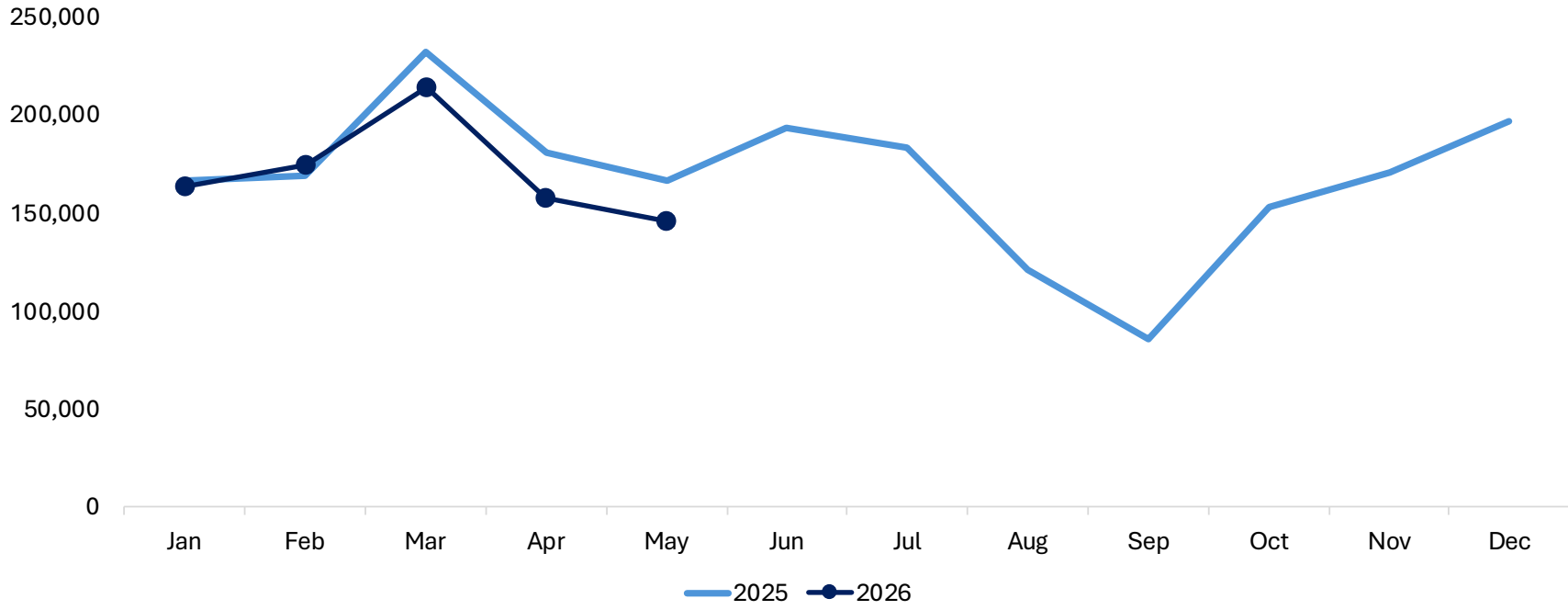
U.S.A.	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cum. Jan-May	Annual Total
2025	167,167	170,023	233,077	181,481	167,377	193,806	184,297	121,520	86,342	153,508	171,178	197,092	919,125	2,026,868
2026	163,756	175,414	214,793	158,274	146,147								858,384	

Results
May-2026 vs
May-2025

U.S. Tourists
146,147
-12.7%

YTD Cumulative
Jan to May-2026 vs
Jan to May-2025

U.S. Tourists
858,384
-6.6%



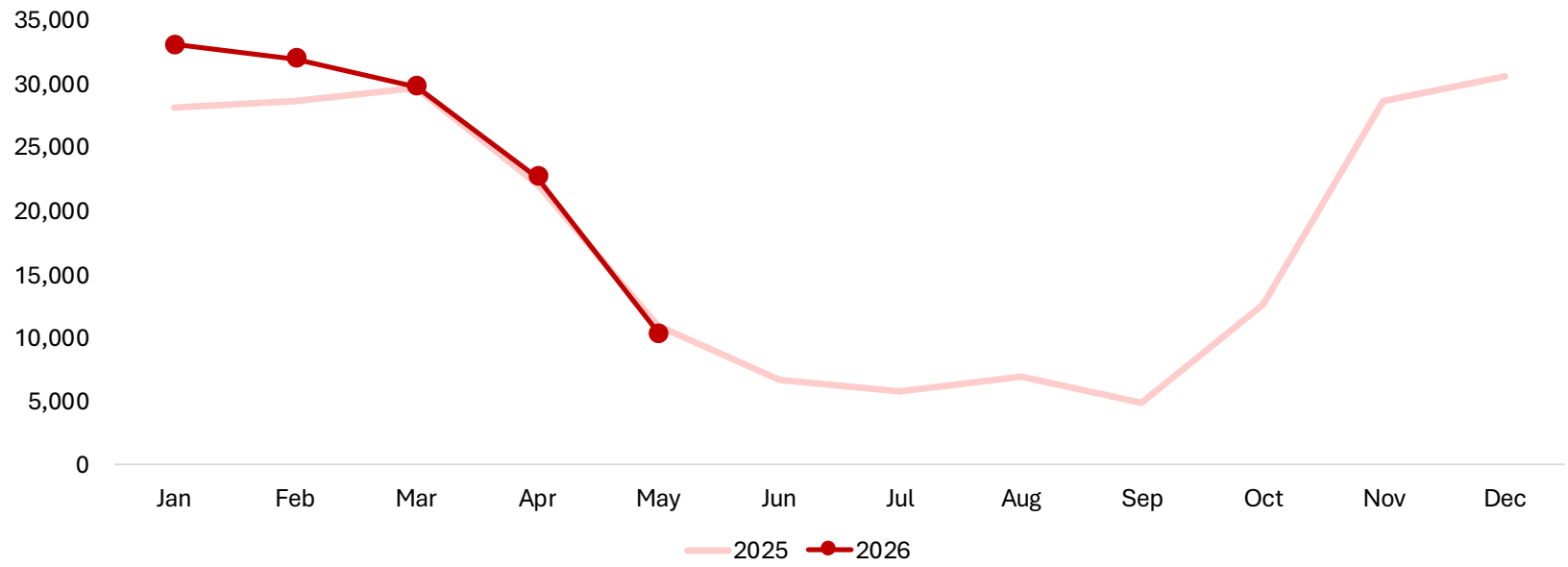
Note: 3

Source: INM-SIOM

LOS CABOS
TOURISM OBSERVATORY

International Tourist Arrivals, Canada

Canada	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cum. Jan-May	Annual Total
2025	28,276	28,714	29,804	22,125	10,973	6,688	5,814	7,042	4,948	12,725	28,831	30,666	119,892	216,606
2026	33,201	32,140	29,889	22,753	10,366								128,349	



Results

May-2026 vs
May-2025

Canadian Tourists

10,366

-5.5%

YTD Cumulative

Jan to May-2026 vs
Jan to May-2025

Canadian Tourists

128,349

+7.1%

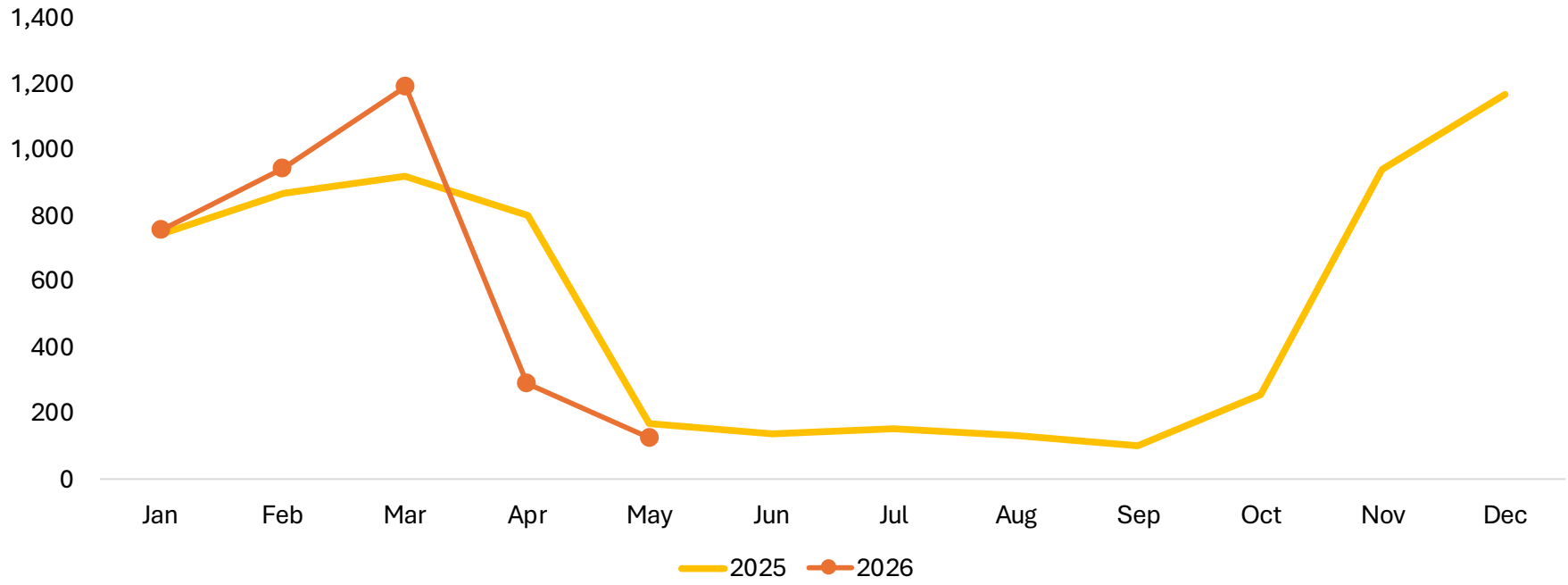
Note: 3

Source: INM-SIOM

LOS CABOS
TOURISM OBSERVATORY

International Tourist Arrivals, Germany

Germany	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Cum. Jan-May	Annual Total
2025	744	870	921	805	170	138	152	131	100	259	941	1,105	3,510	6,336
2026	757	944	1,196	289	126								3,312	



Results
May-2026 vs
May-2025

German Tourists
126
-25.9%

YTD Cumulative
Jan to May-2026 vs
Jan to May-2025

German Tourists
3,312
-5.6%

Note: 3

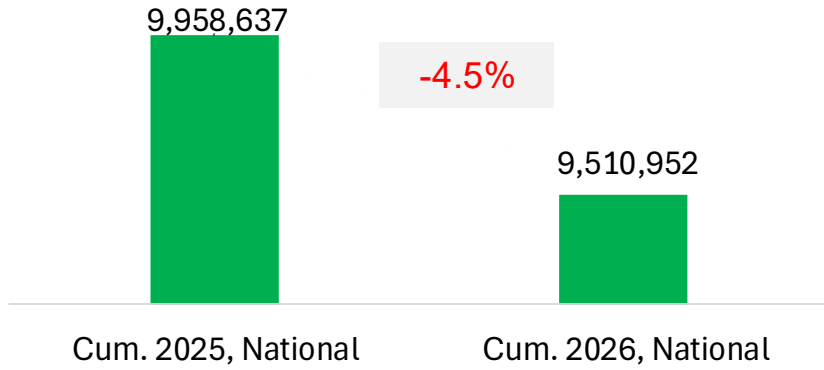
Source: INM-SIOM

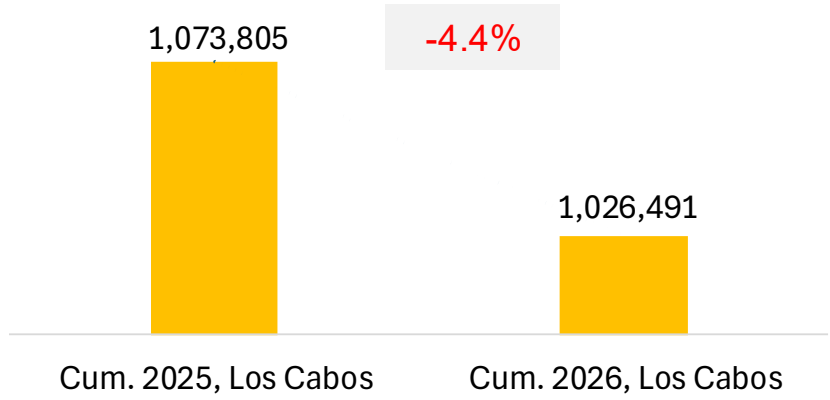
LOS CABOS
TOURISM OBSERVATORY

International Tourist Arrivals, by Nationality

Region	National			Los Cabos		
	Cum. 2025	Cum. 2026	Δ 2026/2025	Cum. 2025	Cum. 2026	Δ 2026/2025
United States	6,161,346	5,598,657	-9.1%	919,125	858,384	-6.6%
Canada	1,606,550	1,735,727	8.0%	119,892	128,349	7.1%
Europe	885,587	887,988	0.3%	14,225	14,874	4.6%
Caribbean, South and Central America	942,805	1,735,727	84.1%	3,116	9,333	202.3%
Rest	362,349	343,232	-5.3%	17,447	15,551	-10.9%
Total	**9,958,637**	**9,510,952**	**-4.5%**	**1,073,805**	**1,026,491**	**-4.4%**

Key Market	National			Los Cabos		
	Cum. 2025	Cum. 2026	Δ 2026/2025	Cum. 2025	Cum. 2026	Δ 2026/2025
United Kingdom	183,754	188,256	2.5%	4,096	3,856	-5.9%
Spain	136,964	137,554	0.4%	703	804	14.4%
Germany	113,996	111,201	-2.5%	3,510	3,312	-5.6%
Australia	24,649	21,771	-11.7%	2,682	2,206	-17.7%
South Korea	47,539	45,593	-4.1%	1,519	1,244	-18.1%
China	89,454	86,967	-2.8%	3,697	3,713	0.4%
India	54,690	47,395	-13.3%	4,138	3,462	-16.3%
Total	**651,046**	**638,737**	**-1.9%**	**20,345**	**18,597**	**-8.6%**





Note: 3

Cumulative Results
Jan to May-2026 vs
Jan to May-2025

Total Tourist Arrivals
all Mexico
9,510,952
-4.5%

Key Markets
all Mexico
638,737
-1.9%

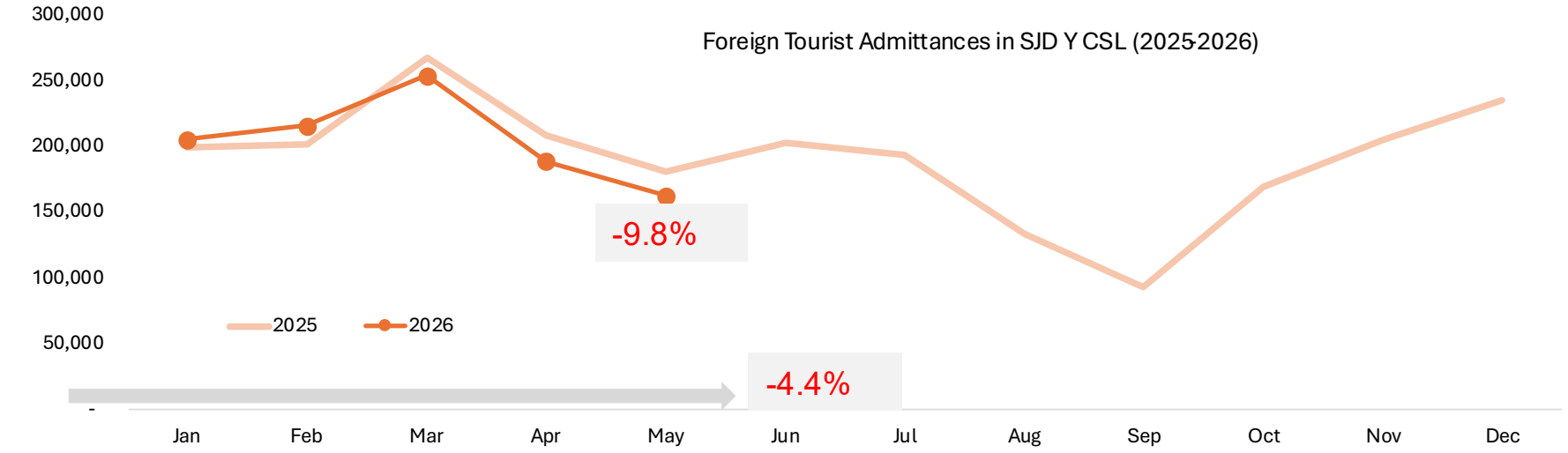
Total Tourist Arrivals
Los Cabos
1,026,491
-4.4%

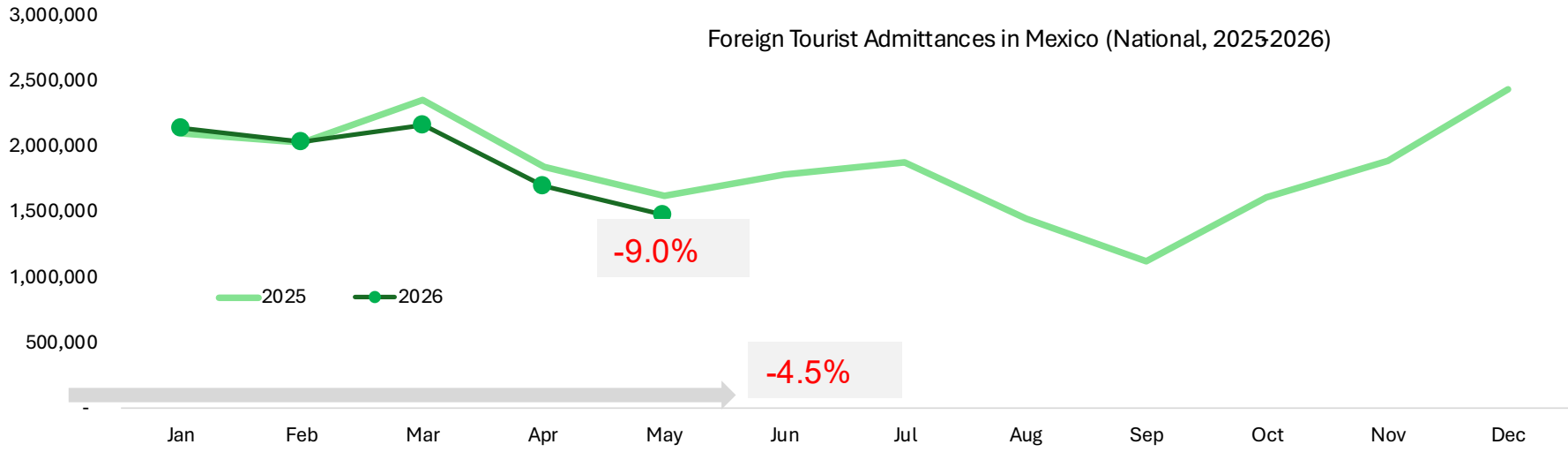
Key Markets
Los Cabos
18,597
-8.6%

Source: INM-SIOM

LOS CABOS
TOURISM OBSERVATORY

International Tourist Arrivals





Note: 3

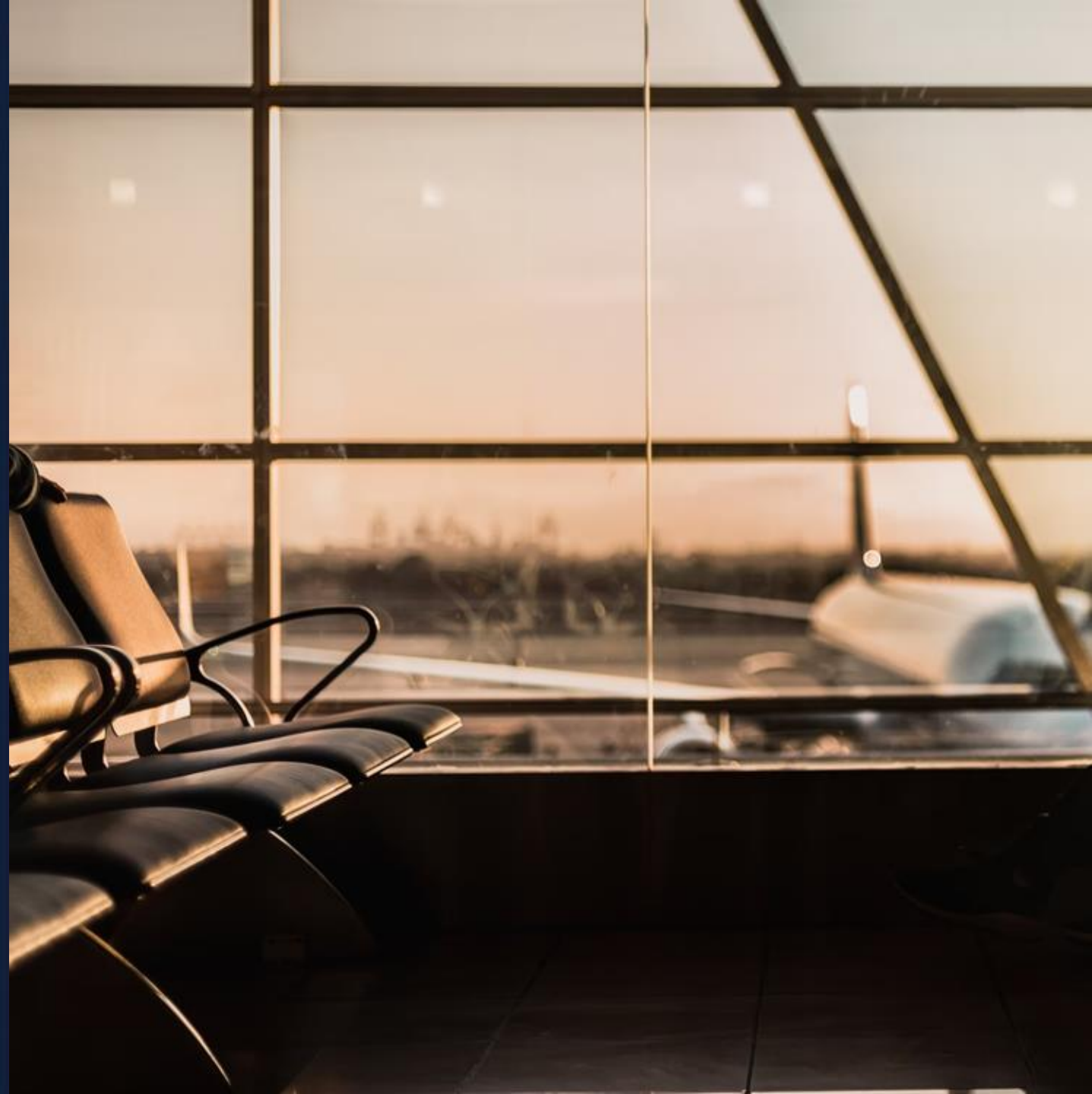
Source: INM-SIOM

LOS CABOS

TOURISM OBSERVATORY

AIR TRAFFIC

SEAT SCHEDULING



LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling for the Upcoming 6 Months, domestic

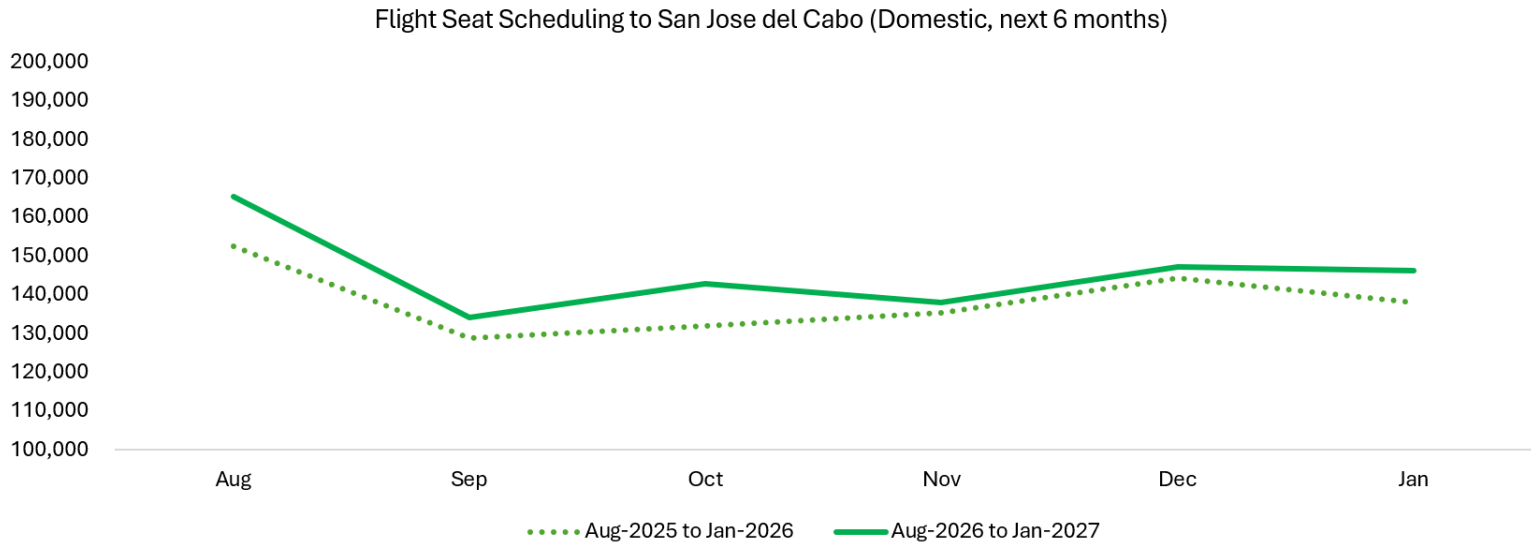
Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

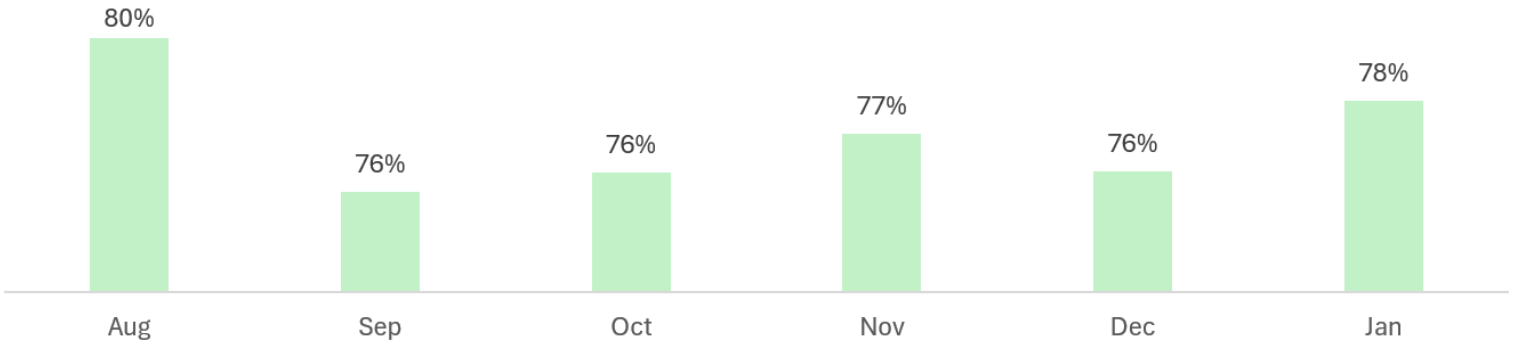
Scheduled Seats
874 thousand
+5.2%

CDMX
372.7 thousand
+6.7%

GDL
132.5 thousand
-5.5%

TIJ
156.7 thousand
+4.8%





Occupancy Previous Year

Note: 6

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling for the Upcoming 6 Months, domestic

Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

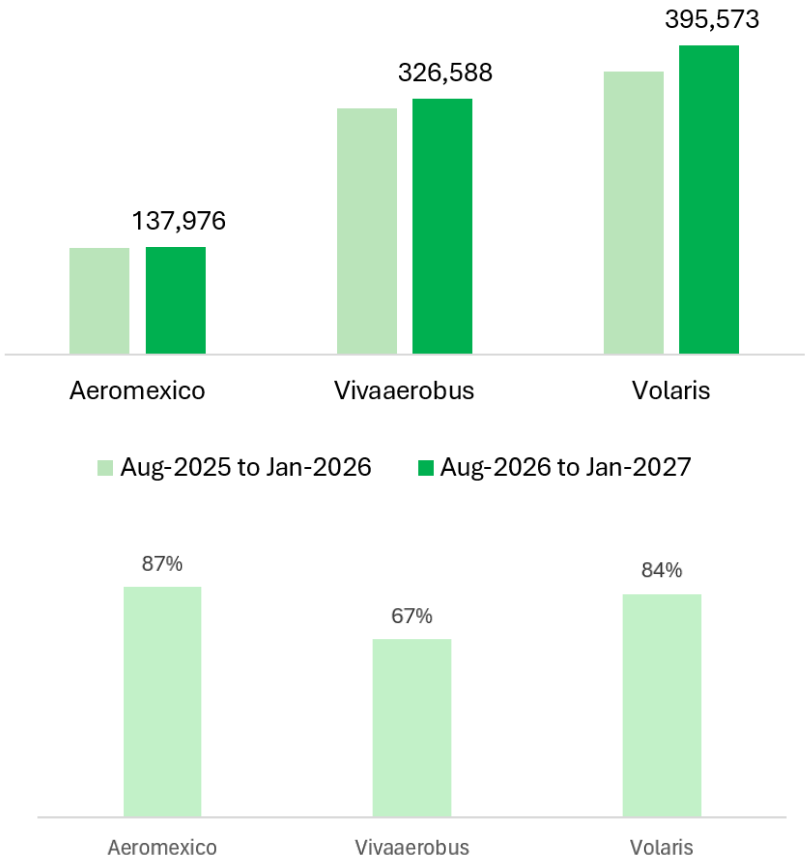
Scheduled Seats
874 thousand
+5.2%

Aeroméxico
138 thousand
+1.3%

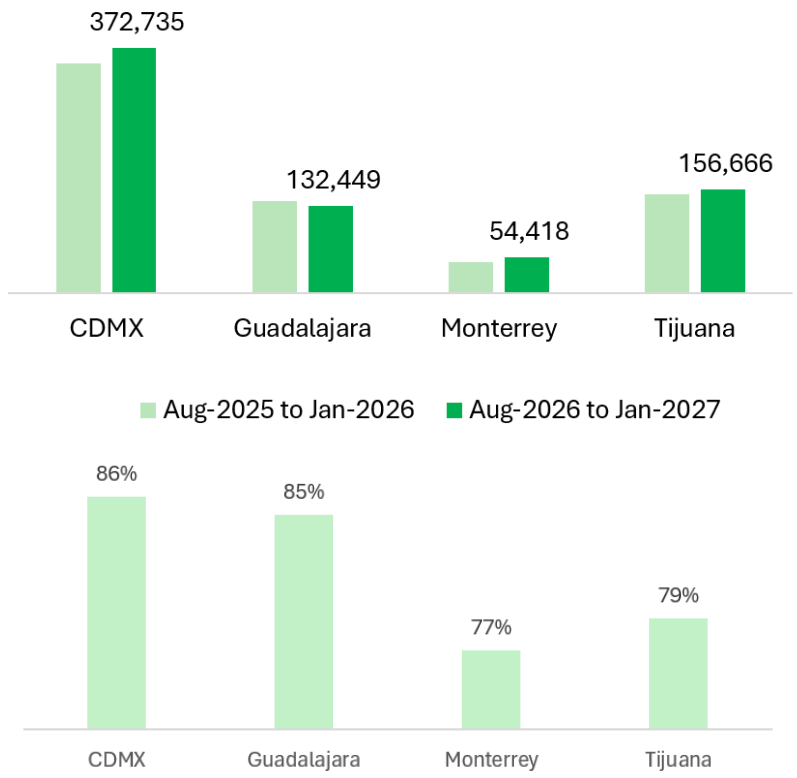
Viva Aerobús
326.6 thousand
+3.8%

Volaris
395.6 thousand
+9.4%

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



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



Occupancy Previous Year

Note:

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

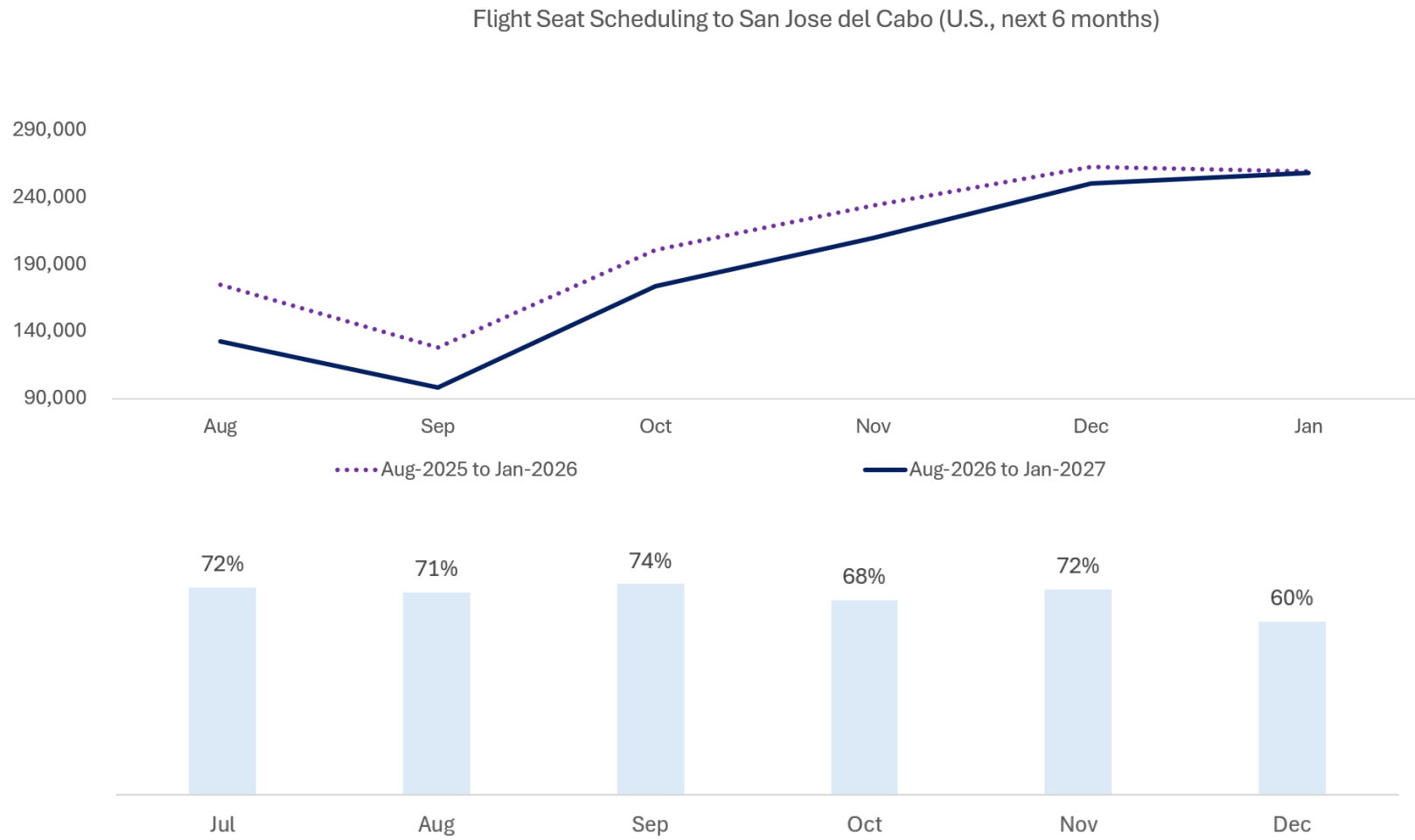
Scheduled Seats
1.12 million
-10.9%

Dallas Fort Worth (DFW)
164.5 thousand
+2.9%

Los Angeles (LAX)
154 thousand
-26.7%

Phoenix (PHX)
124.4 thousand
-3.6%

Seat Scheduling for the Upcoming 6 Months, U.S.



Load factor Previous Year

Note: 6

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling for the Upcoming 6 Months, U.S.

Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

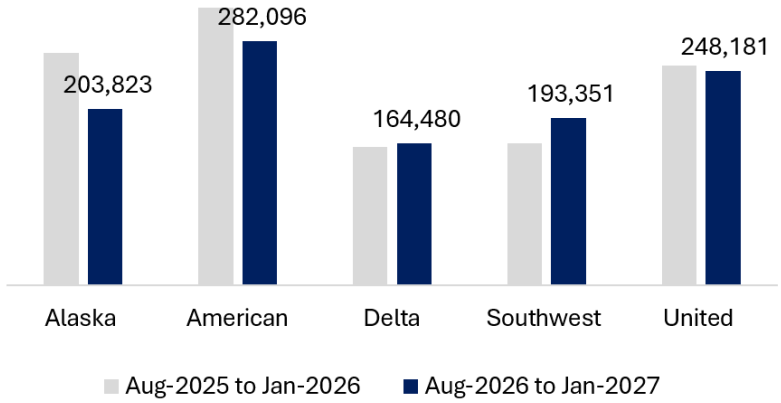
Scheduled Seats
1.12 million
-10.9%

Alaska
203.8 thousand
-24.1%

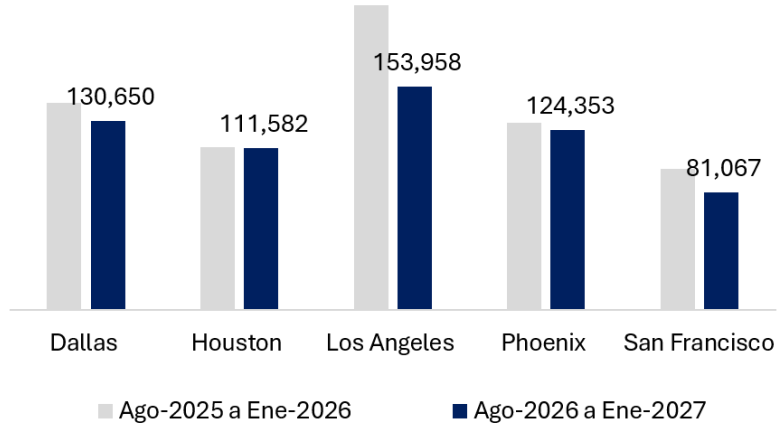
American Airlines
282.1 thousand
-12.1%

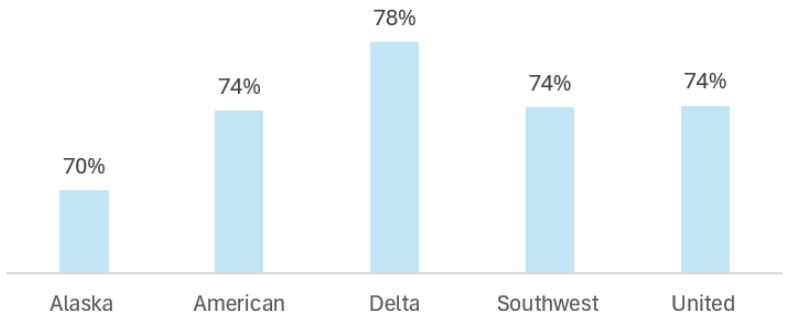
United
248.2 thousand
-2.5%

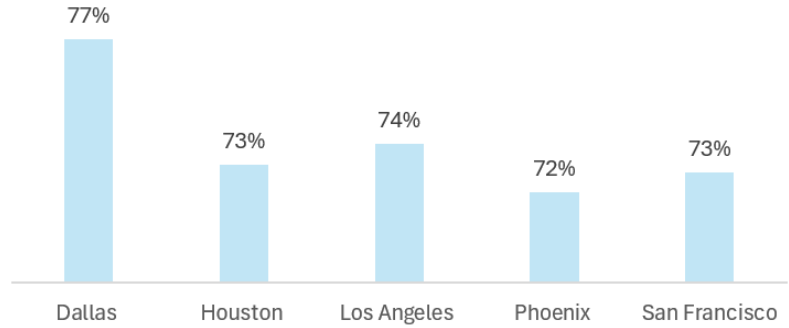
Flight Seat Scheduling per Airline (U.S., next 6 months)



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







Load factor Previous Year

Note: 6

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

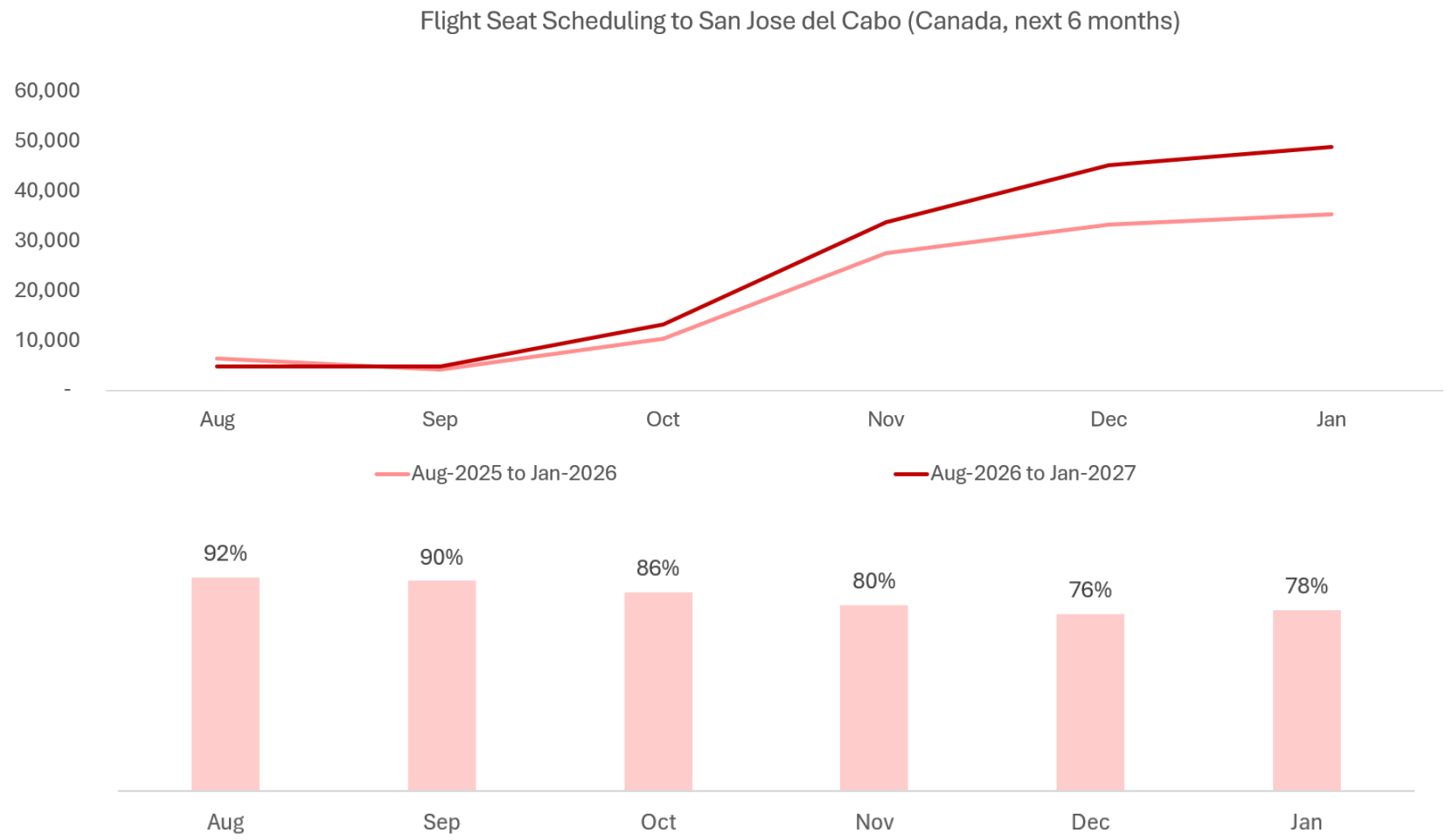
Scheduled Seats
150.8 thousand
+28.9%

Calgary (YYC)
34 thousand
+9.5%

Toronto (YYZ)
30.6 thousand
+37.9%

Vancouver (YVR)
47 thousand
+6.6%

Seat Scheduling for the Upcoming 6 Months, Canada



Note: 6

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling for the Upcoming 6 Months, Canada

Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

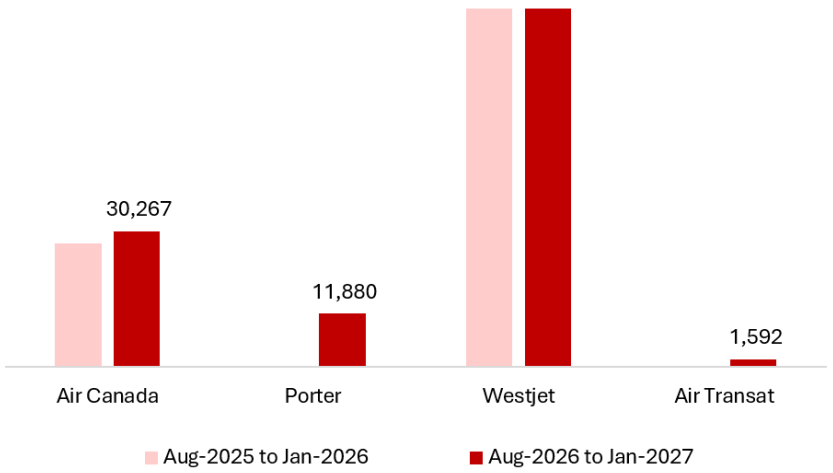
Scheduled Seats
150.8 thousand
+28.9%

Air Canada
30.3 thousand
+9.9%

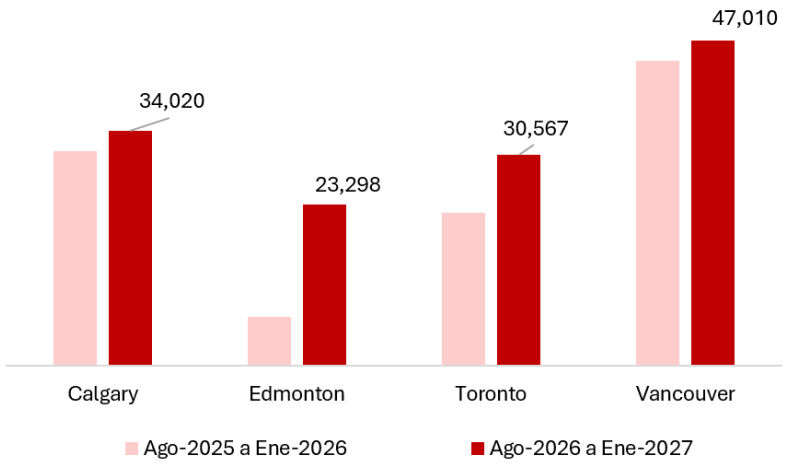
Porter
11.9 thousand

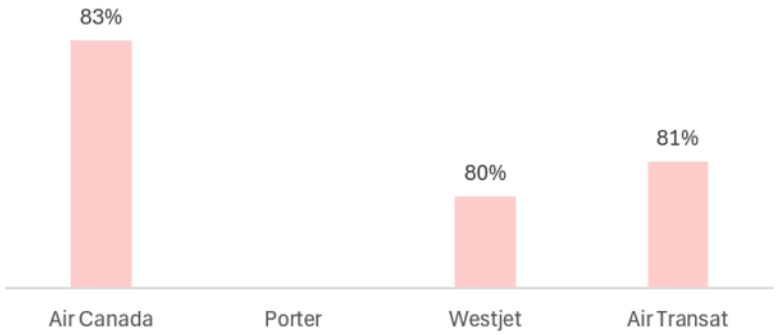
Westjet
107 thousand
+19.7%

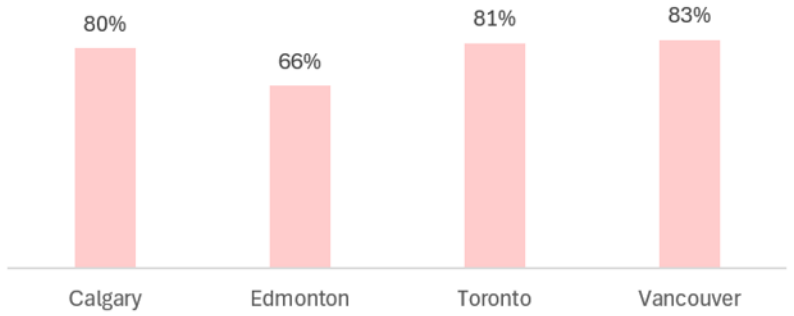
Flight Seat Scheduling per Airline (Canada, next 6 months)



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







Load factor Previous Year

Note: 6

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

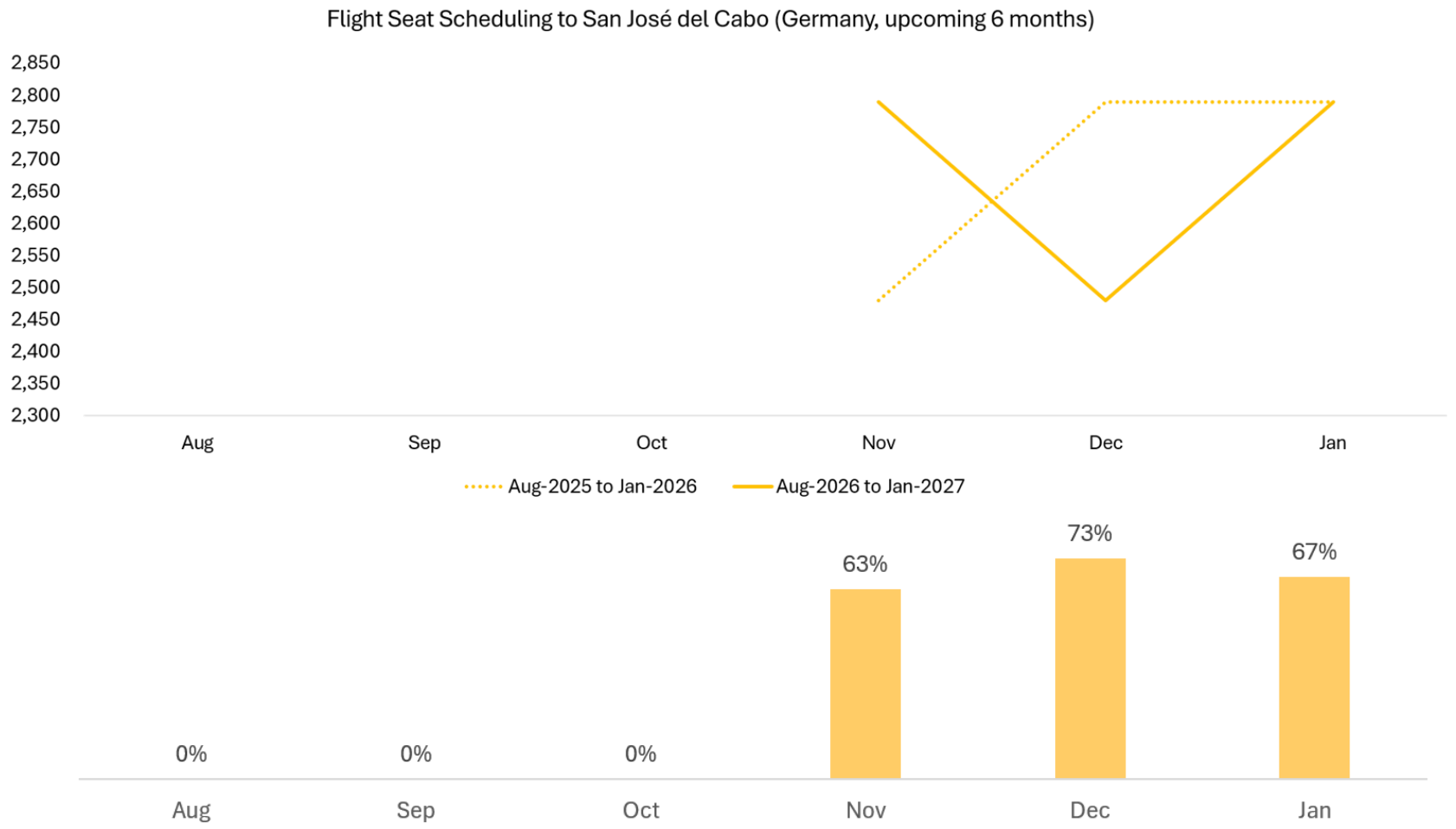
Seat Scheduling for the Upcoming 6 Months, Germany

Seat Scheduling for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

Seat Scheduling (FRA, Condor Flugdienst)

8 thousand

No change



Load factor Previous Year

Note:

Source: OAG

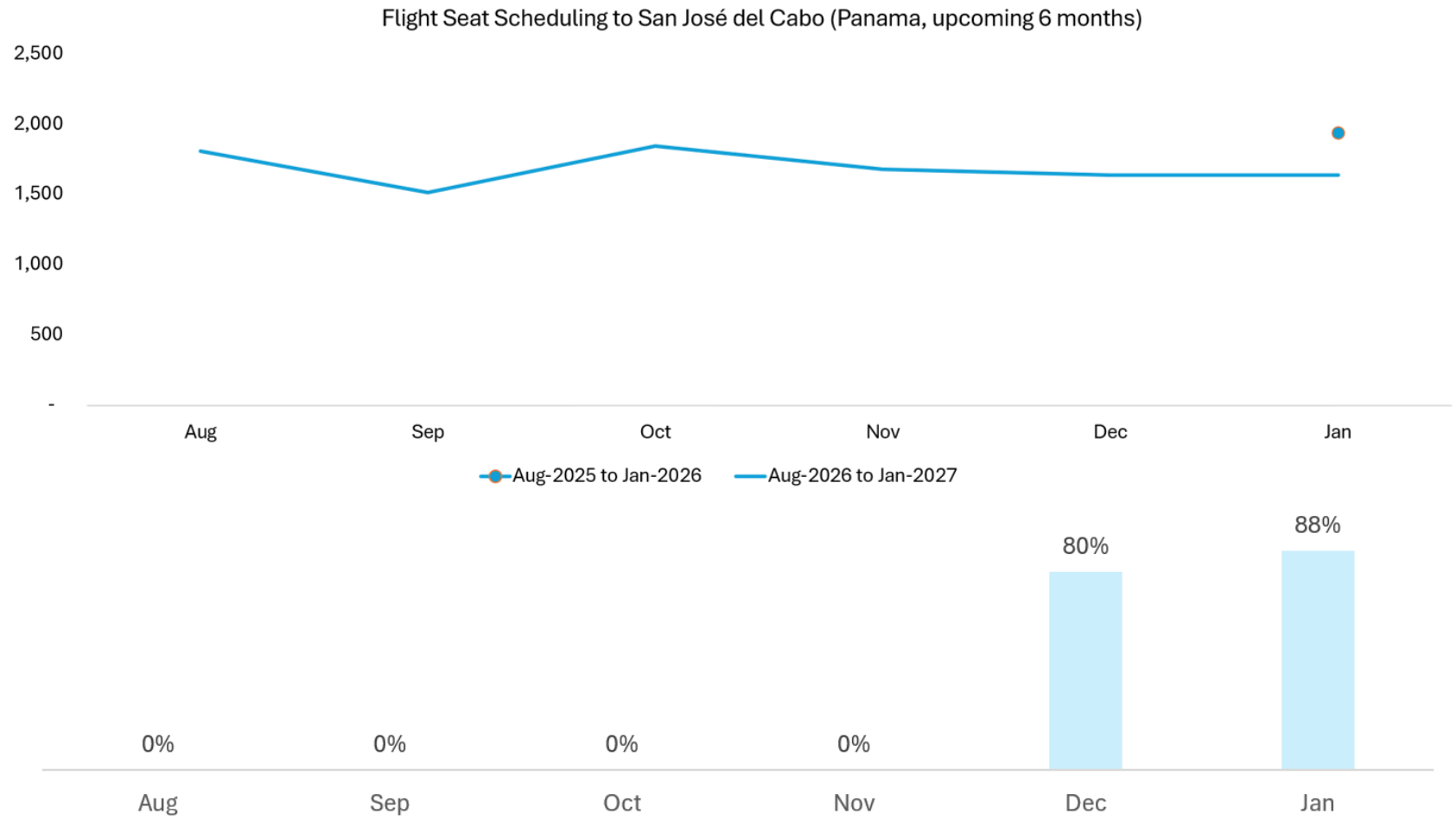
LOS CABOS
TOURISM OBSERVATORY

Scheduling Seat for the Upcoming 6 Months (Aug 2026 to Jan 2027 vs Year Prior)

Scheduling Seat (PTY, Copa Airlines)

10.1 thousand

Seat Scheduling for the Upcoming 6 Months, Panama



Load factor Previous Year

Note: 6

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Historical Load Factors
(Aug 2025 to Jan 2026)

Domestic Airlines
77%

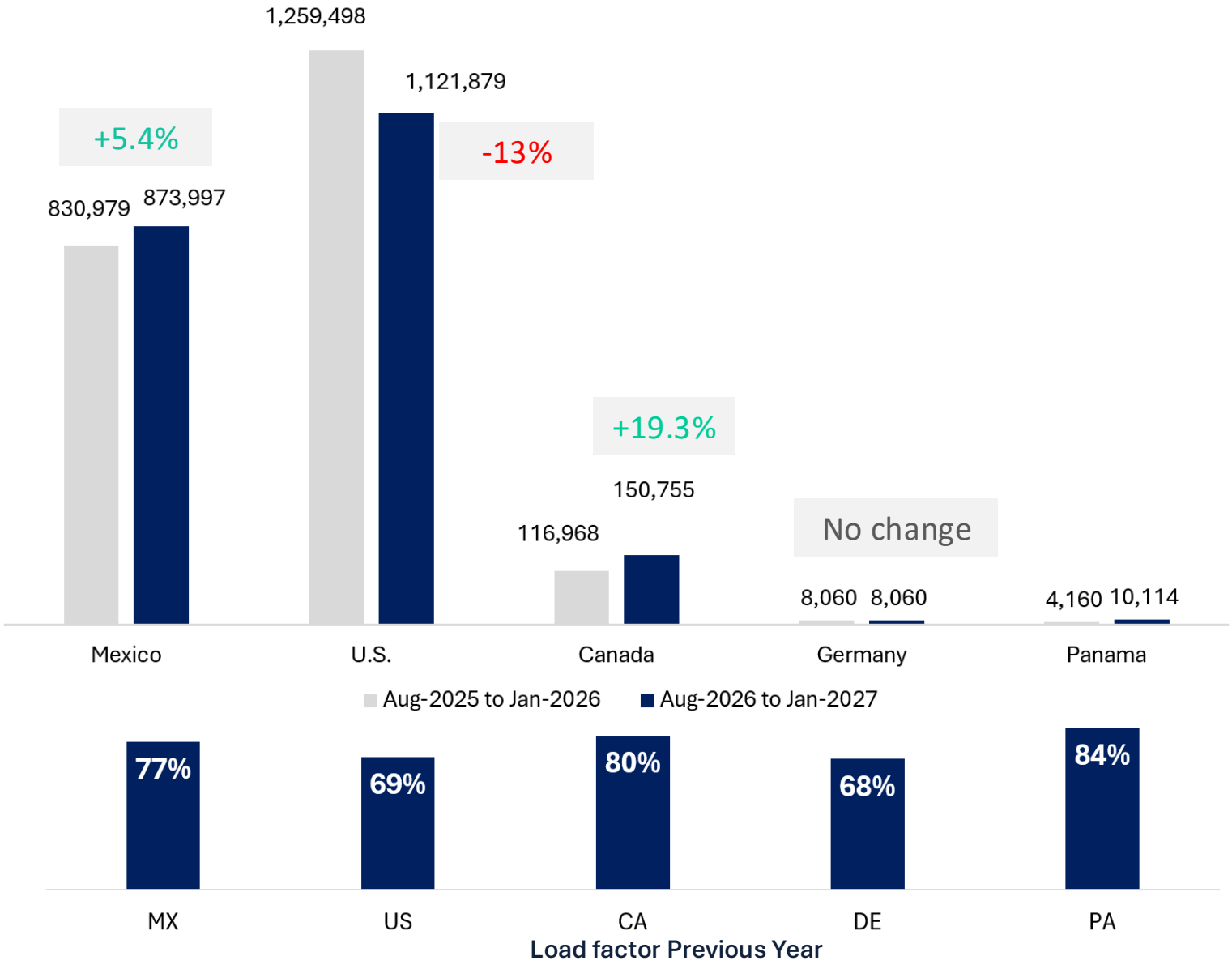
U.S. Airlines
69%

Canadian Airlines
80%

German Airlines
68%

Panamanian Airlines
84%

Scheduling Seat : Load Factors



Note: 6

Source: OAG

* Only the occupancy figures for Dec-2025 and Jan-2026 are considered, since the flight began operating in Dec-2025

LOS CABOS

TOURISM OBSERVATORY

ACCOMMODATION

HOTEL ACTIVITY



LOS CABOS
TOURISM OBSERVATORY

Hotel Occupancy in Los Cabos and Subdestinations

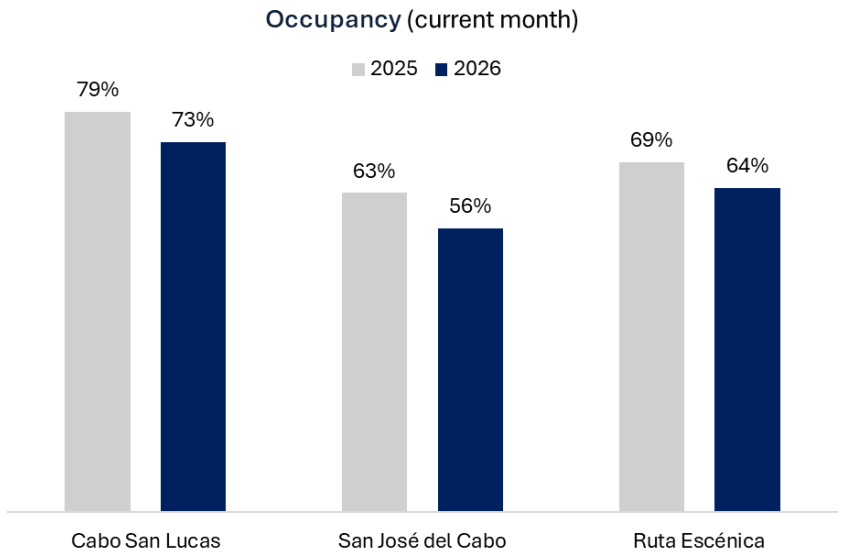
Hotel Occupancy
Jun-2026
vs Jun-2025

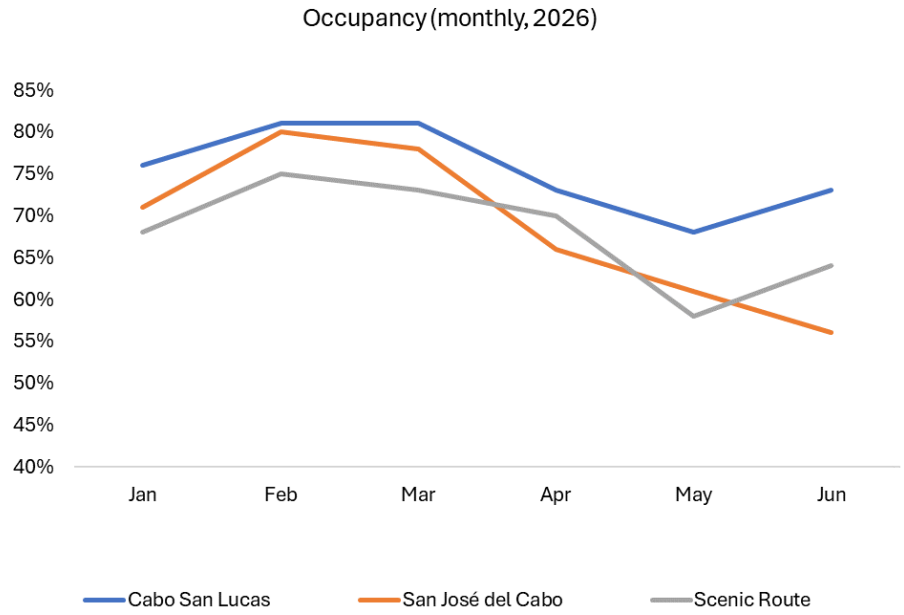
Los Cabos
68%
-6.0pp

Cabo San Lucas
73%
-6.0pp

San José del Cabo
56%
-7.0pp

Scenic Route
64%
-5.0pp





Note: 7

Average Occupancy	Los Cabos	Cabo San Lucas	San José del Cabo	Scenic Route
Jan-Jun 2026 vs Jan-Jun 2025	73%	75%	69%	68%
	-3.3pp	-3.2pp	-1.0pp	-3.7pp

Source: AHLC

LOS CABOS
TOURISM OBSERVATORY

Average Daily Rate in Los Cabos and Subdestinations

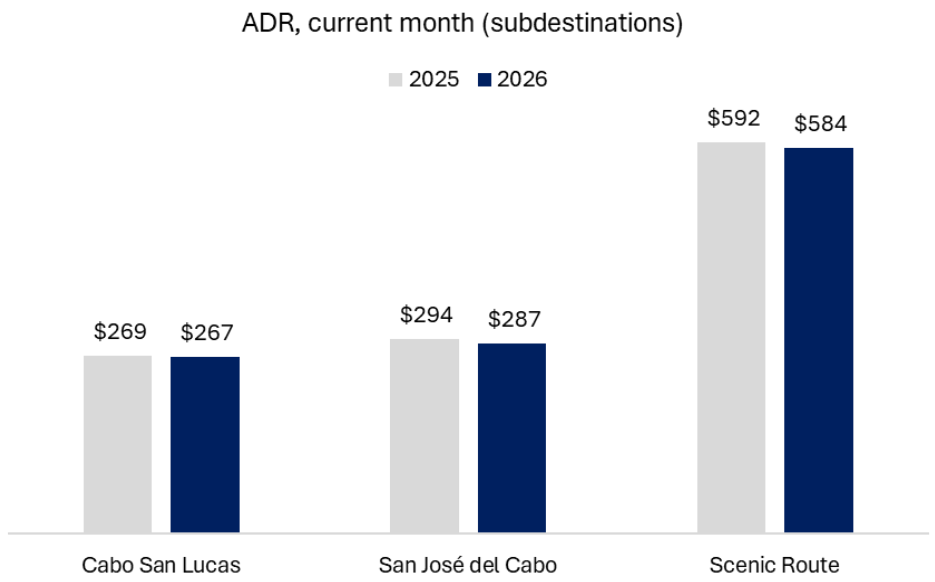
Average Daily Rate (ADR)
Jun-2026
vs Jun-2025

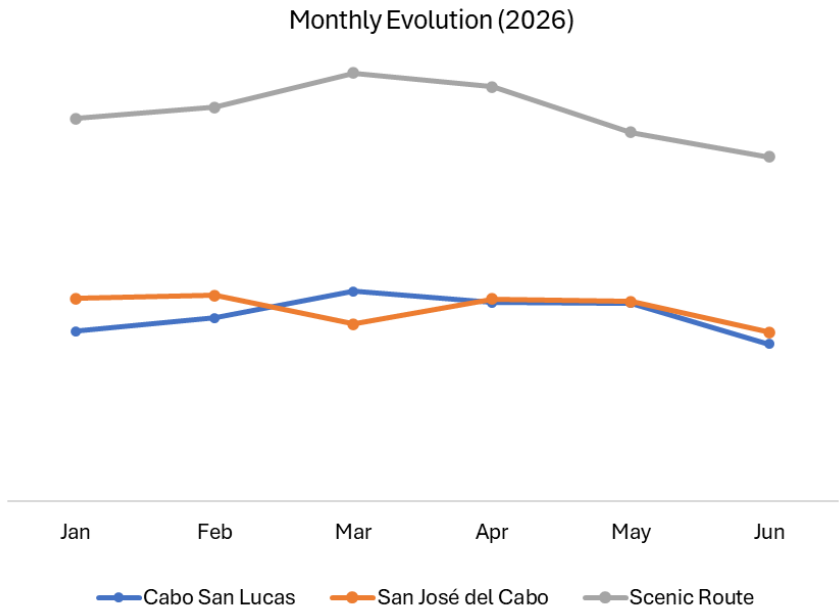
Los Cabos
$393
-2.7%

Cabo San Lucas
$267
-0.7%

San José del Cabo
$287
-2.4%

Scenic Route
$584
-1.4%





Note: 7

Average Daily Rate (ADR)	Los Cabos	Cabo San Lucas	San José del Cabo	Scenic Route
Jan-Jun 2026 vs Jan-Jun 2025	$469	$316	$327	$659
	+1.3%	-1.2%	+5.2%	-7.2%

Source: AHLC

LOS CABOS
TOURISM OBSERVATORY

Occupancy and ADR in Los Cabos (All Accommodation Plans)

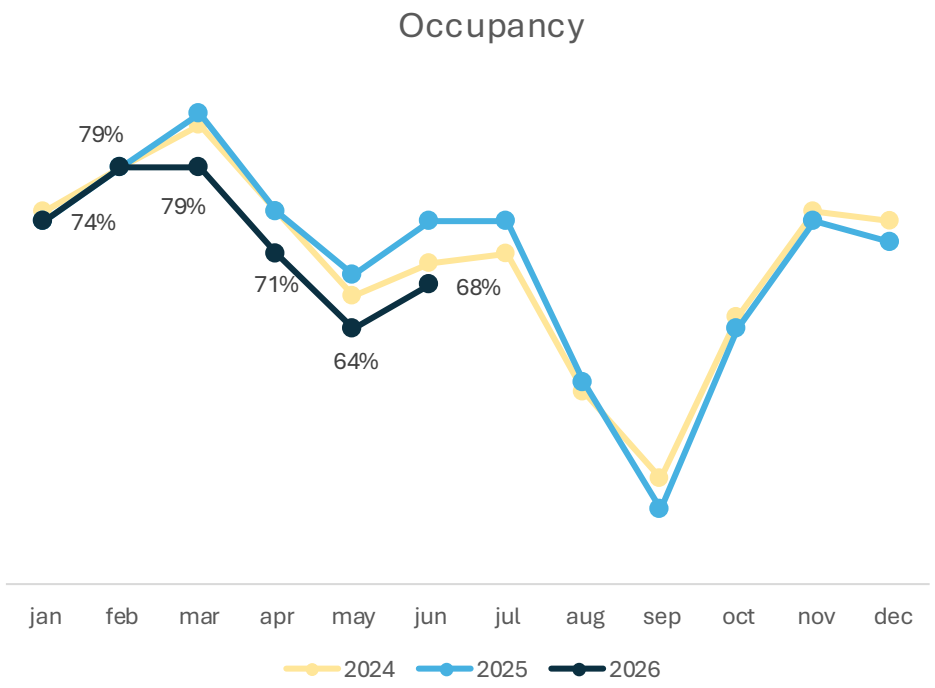
Jun-2026
vs Jun-2025

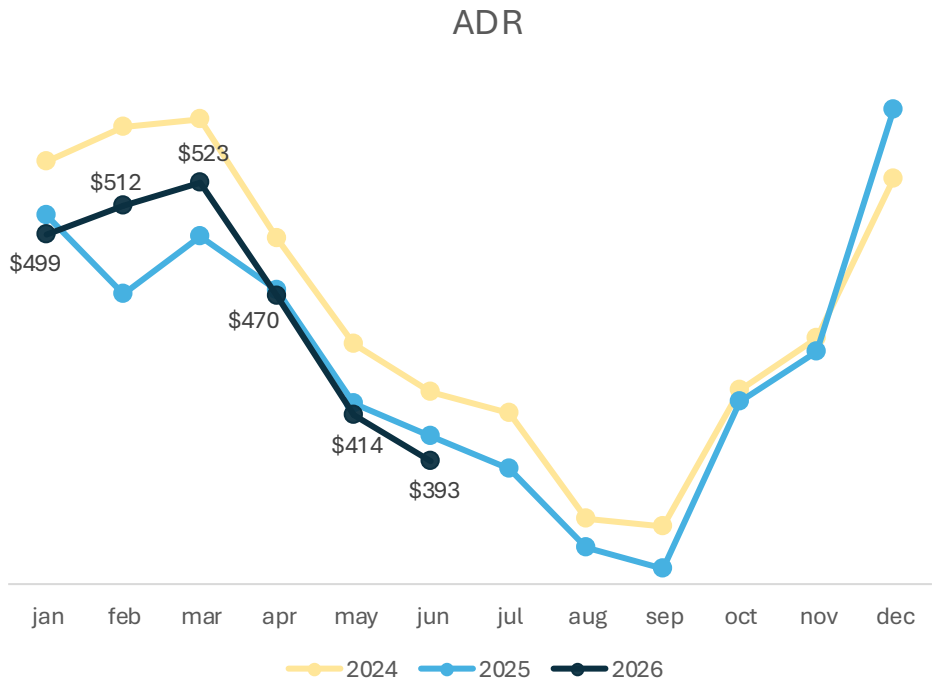
Occupancy
68%
-6pp

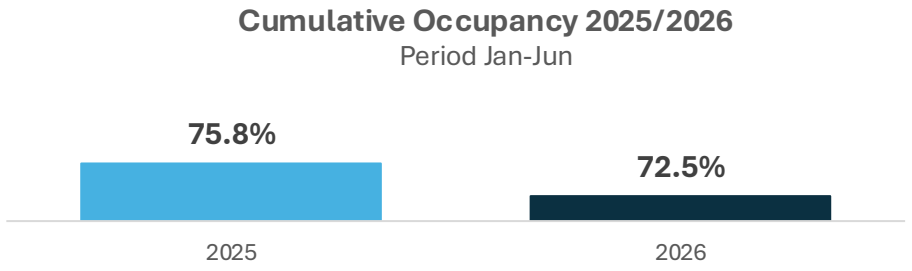
ADR
$393
-2.7%

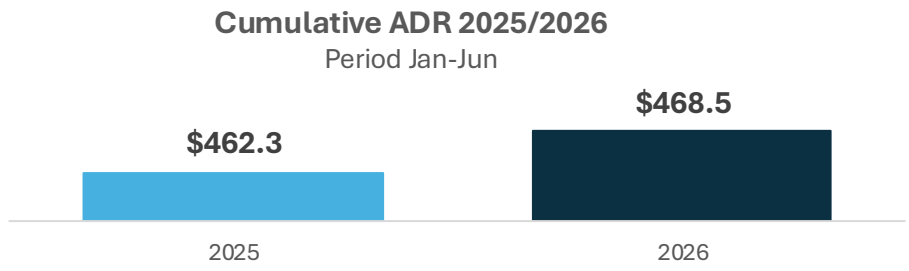
Occupancy
(Jan-Jun 2026):
72.5%
-3.3pp vs Jan-Jun 2025

ADR
(Jan-Jun 2026):
$468.5
+1.3% vs Jan-Jun 2025









Notes: 7 8

Source: AHLC

LOS CABOS

TOURISM OBSERVATORY

TOURIST BEHAVIOR

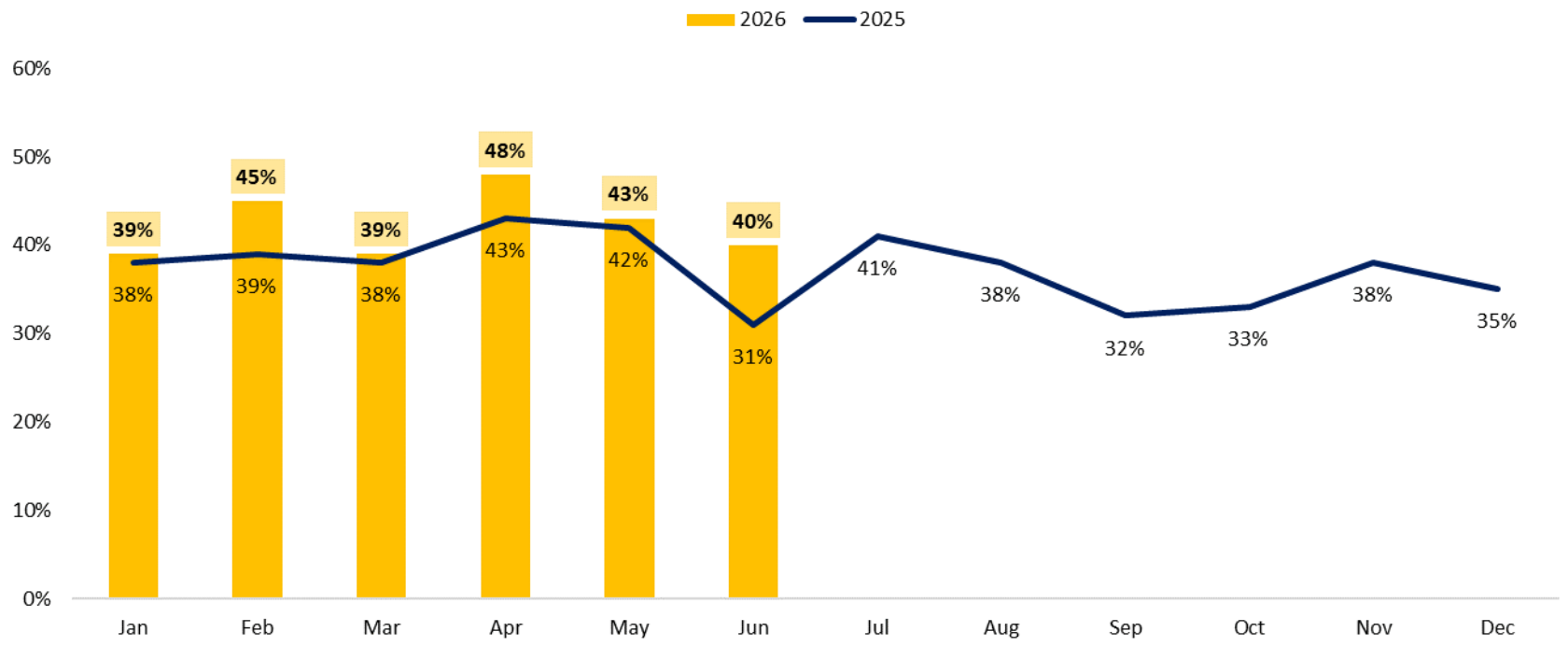


LOS CABOS
TOURISM OBSERVATORY

Returning Tourists

Results
Jun-2026
vs Jun-2025

Returning Tourists
40%
+9pp



Source: FITURCA, Tourist Survey

LOS CABOS
TOURISM OBSERVATORY

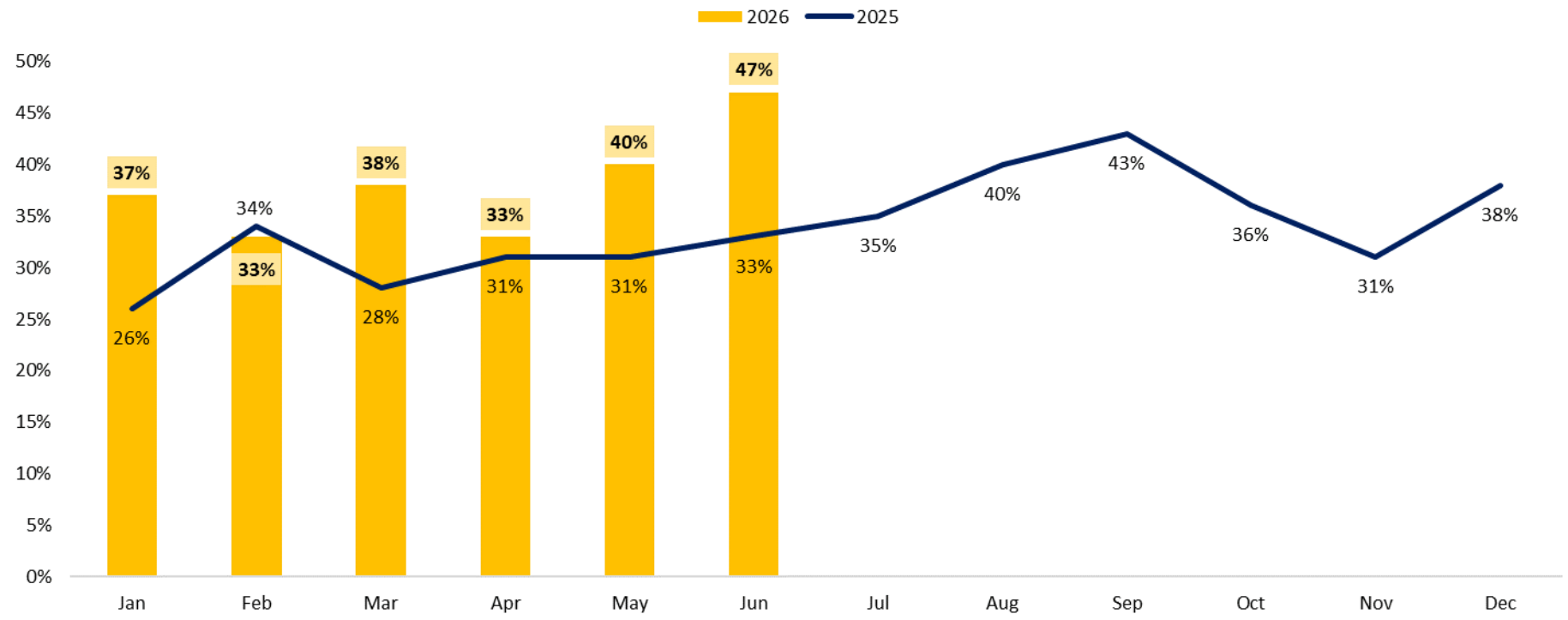
Vacation Packages

Results
Jun-2026
vs Jun-2025

Vacation Packages

47%

+14pp



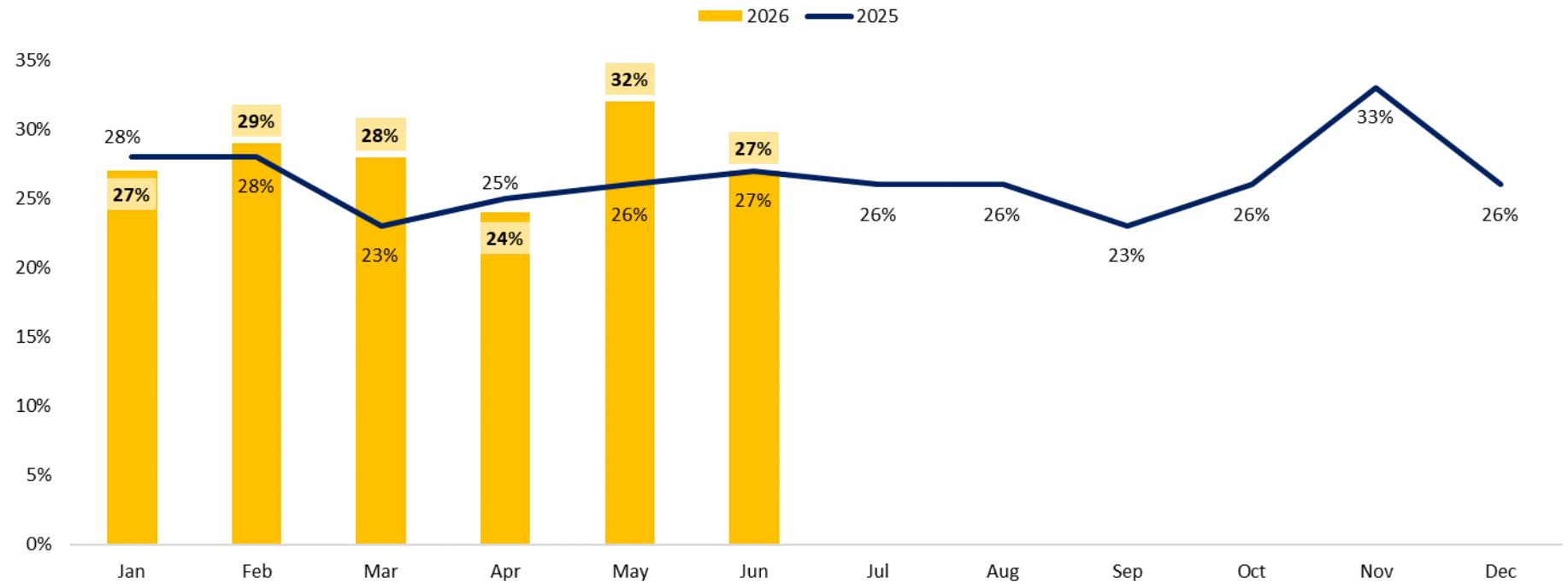
Source: FITURCA, Tourist Survey

LOS CABOS
TOURISM OBSERVATORY

Time Shares

Results
Jun-2026
vs Jun-2025

Time Shares
27%
----pp



Source: FITURCA, Tourist Survey

LOS CABOS

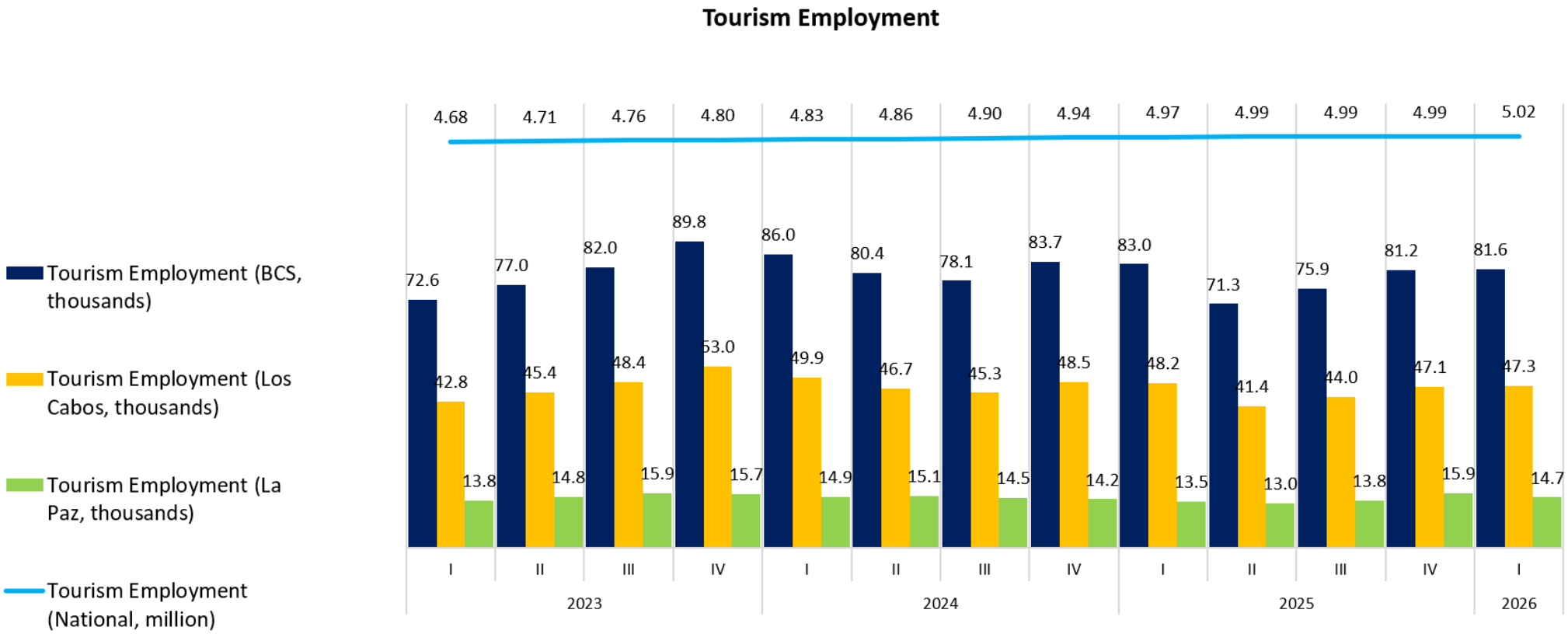
TOURISM OBSERVATORY

ECONOMIC IMPACT OF TOURISM IN LOS CABOS AND BAJA CALIFORNIA SUR



LOS CABOS
TOURISM OBSERVATORY

Formal Employment in Baja California Sur



The tourism employment data series is smoothed by calculating the average of the last four quarters. The goal is to eliminate short- and medium-term fluctuations from the series. Tourism employment includes salaried employees and self-employed workers.

Tourism Employment Estimates for Los Cabos:

Q1 2026 vs Q4 2025

47,336 positions

+0.5%

Source: IMSS, ENOE - INEGI

LOS CABOS
TOURISM OBSERVATORY

Income and Employment in Baja California Sur

Q1 2026
vs Q1 2025

Tourism Income BCS

$11,288 MXN

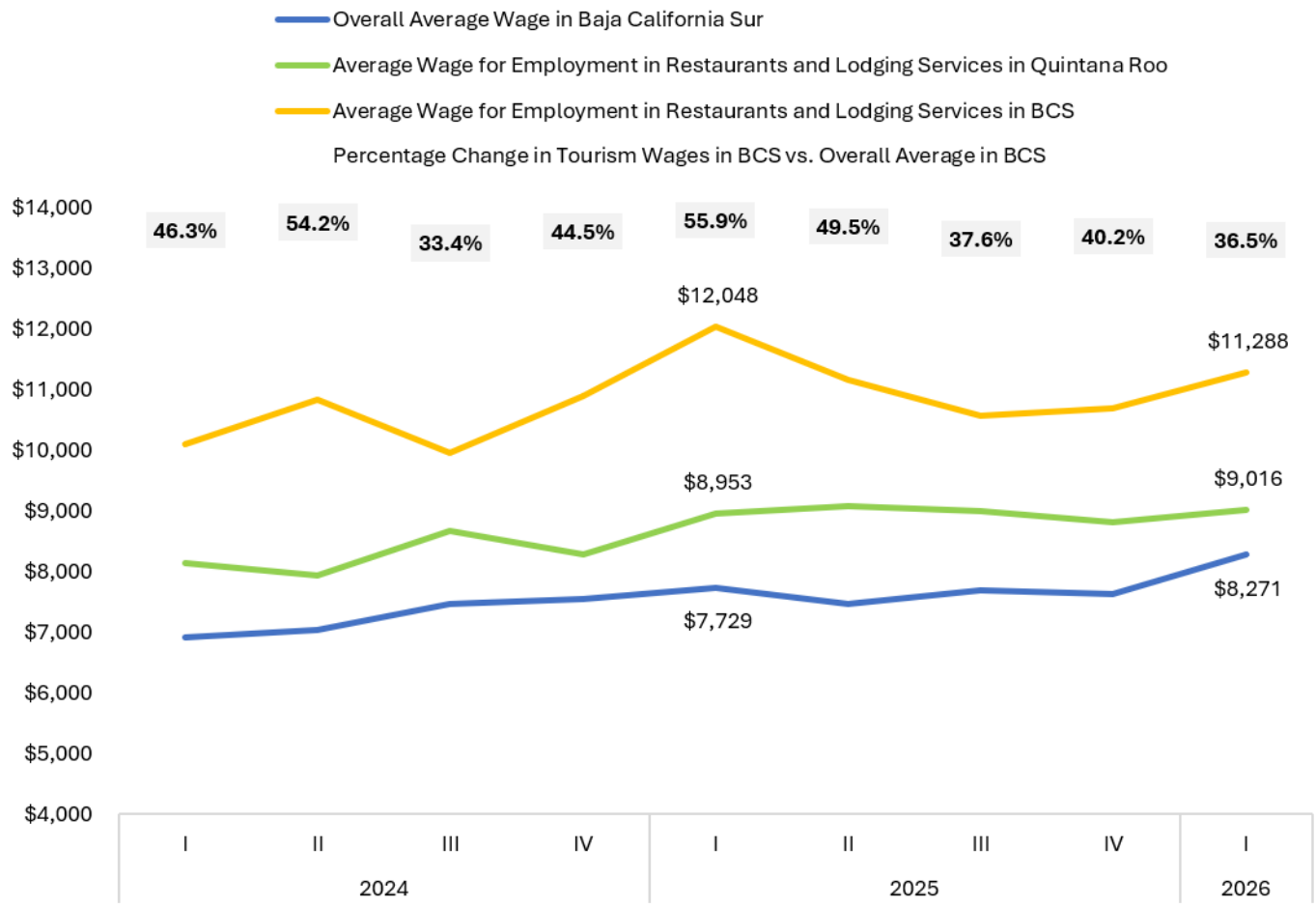
-6.3%

Q1 2026

Tourism Income BCS

+36.5%

vs Q1 2026
Overall Average
Income BCS



Average tourism employment income in BCS (current pesos), Tourism labor income in Quintana Roo and BCS tourism (pesos Q1 2020).

Source: INEGI

LOS CABOS

TOURISM OBSERVATORY

CRUISE ACTIVITY AND MEETINGS



LOS CABOS
TOURISM OBSERVATORY

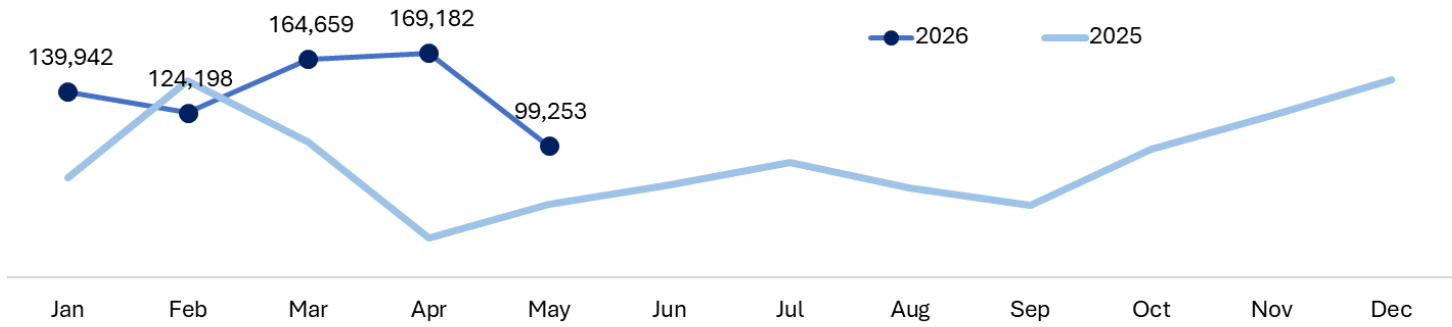
Cruise Activity in Cabo San Lucas

Results
May-2026
vs May-2025

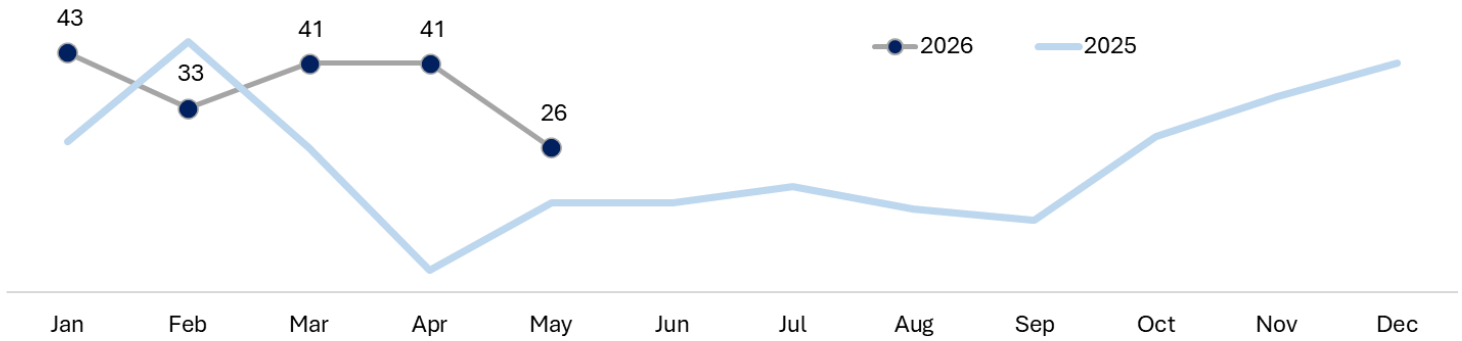
Vessels
26
+62.5%

Passengers
99,253
+80.7%

Cruise ship passengers arriving at the port of Cabo San Lucas, monthly (2025–2026)



Vessels arriving at the port of Cabo San Lucas, monthly (2025–2026)



Cumulative Results
Jan-May 2026
vs Jan-May 2025

Vessels
184
+55.9%

Passengers
697,234
+69.8%

Source: DATATUR-SCT

LOS CABOS
TOURISM OBSERVATORY

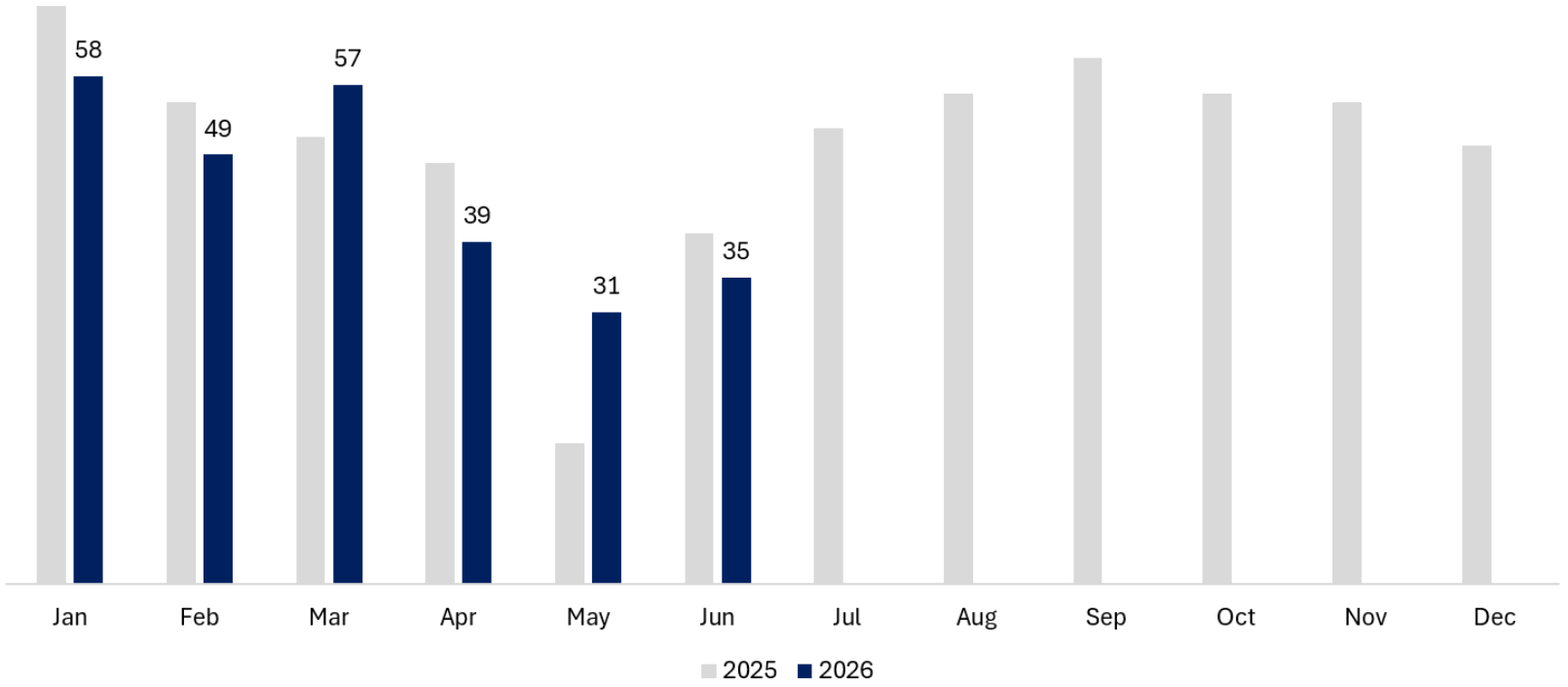
Results
Jun-2026
vs Jun-2025

Received RFPs

35

-12.5%

Received RFPs for Meetings in Los Cabos



Cumulative RFPs

Jan-Jun 2026
vs Jan-Jun 2025

Received RFPs

269

-2.5%

Source: CVENT

LOS CABOS

TOURISM OBSERVATORY

NATIONAL CONTEXT

TOURISM ACTIVITY



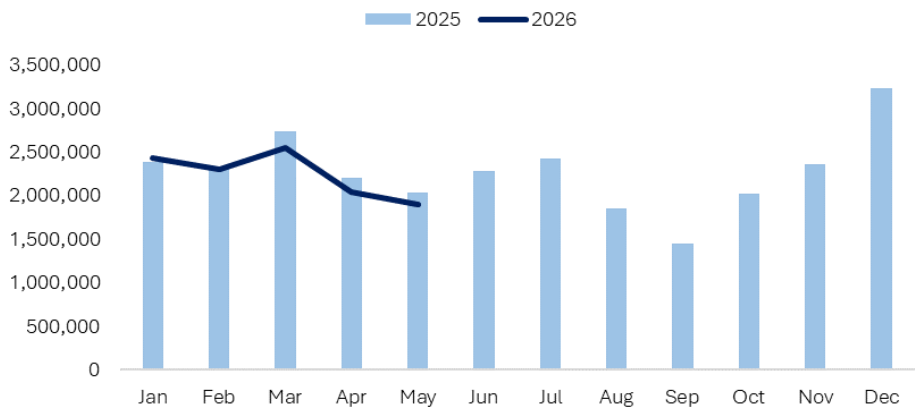
LOS CABOS
TOURISM OBSERVATORY

International Arrivals and Air Traffic in Mexico

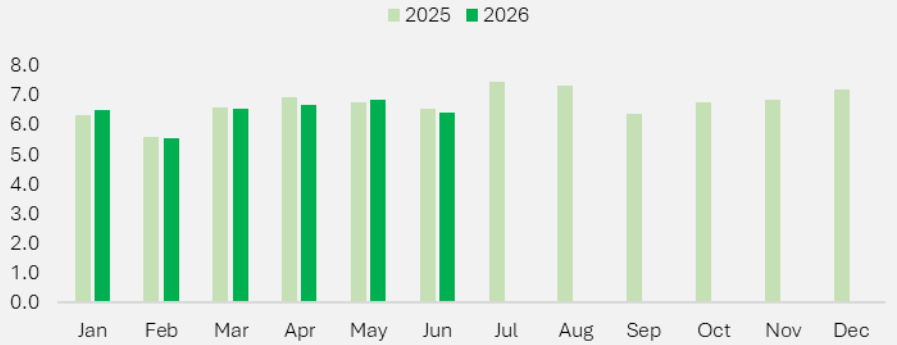
International Tourist Arrivals



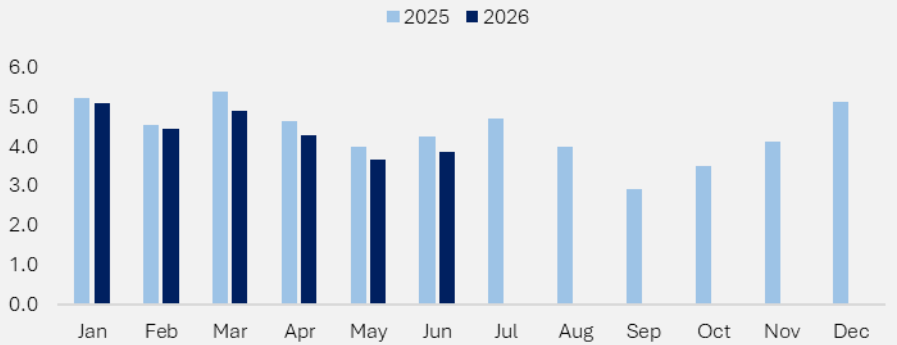
Inbound Tourists



PAX Traffic through **Domestic** Operations (million)



PAX Traffic through **International** Operations (million)



May-2026 vs May-2025

*International Tourist Arrivals
3.9 million
+4.5%

*Inbound Tourists
1.9 million
-6.6%

*Average Spending by Tourists Arriving by Air
$1,269 USD
+3.8%

Jun-2026 vs Jun-2025

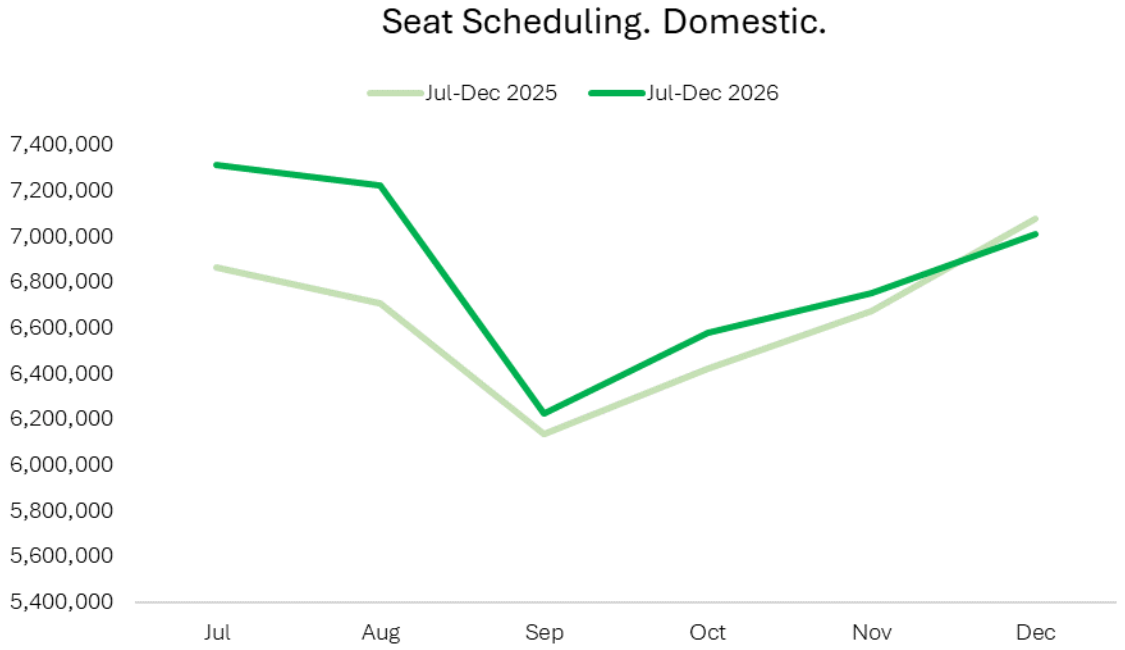
**PAX in Domestic Operations
6.4 million
-1.8%

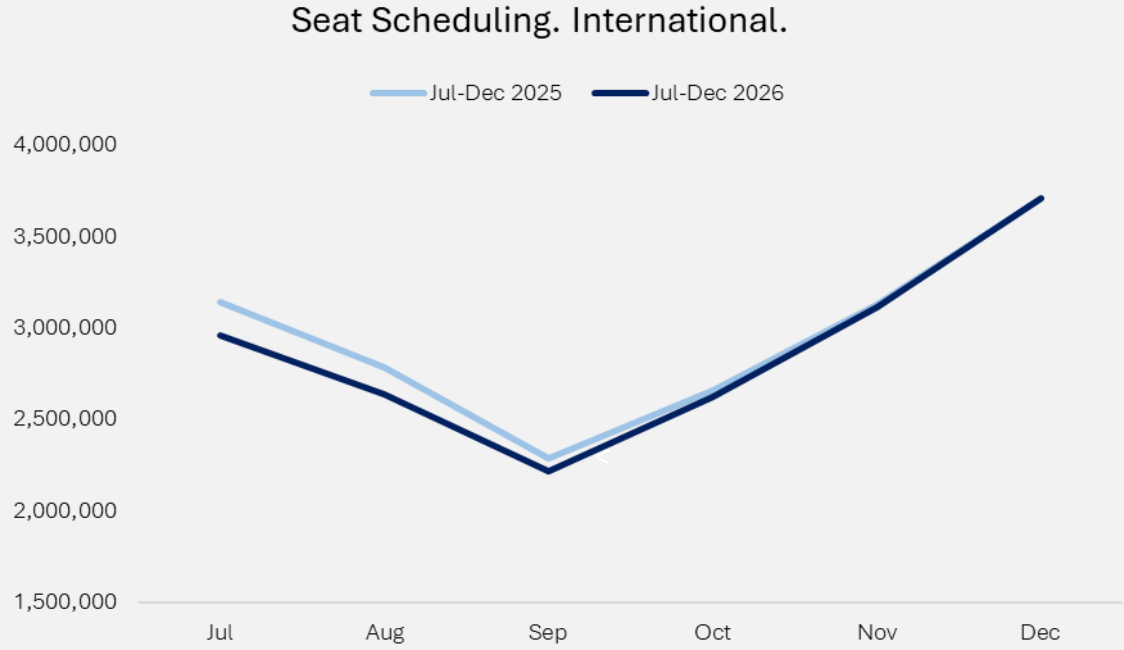
**PAX in International Operations
3.9 million
-8.8%

Source: * International Travellers Survey, INEGI. ** Total Traffic ASUR, OMA, GAP (arrivals and departures), not including CDMX.

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling to Mexico for the Upcoming Months





Seat Scheduling for the Last Week of June 2025 and 2026, respectively.

Seat Scheduling
Jul-Dec 2026
vs Jul-Dec 2025

Domestic Seats
41.1 million
+3.1%

International Seats
17.2 million
-2.6%

Source: International Travellers Survey, INEGI. Total Traffic ASUR, OMA, GAP (arrivals and departures), not including CDMX.

LOS CABOS
TOURISM OBSERVATORY

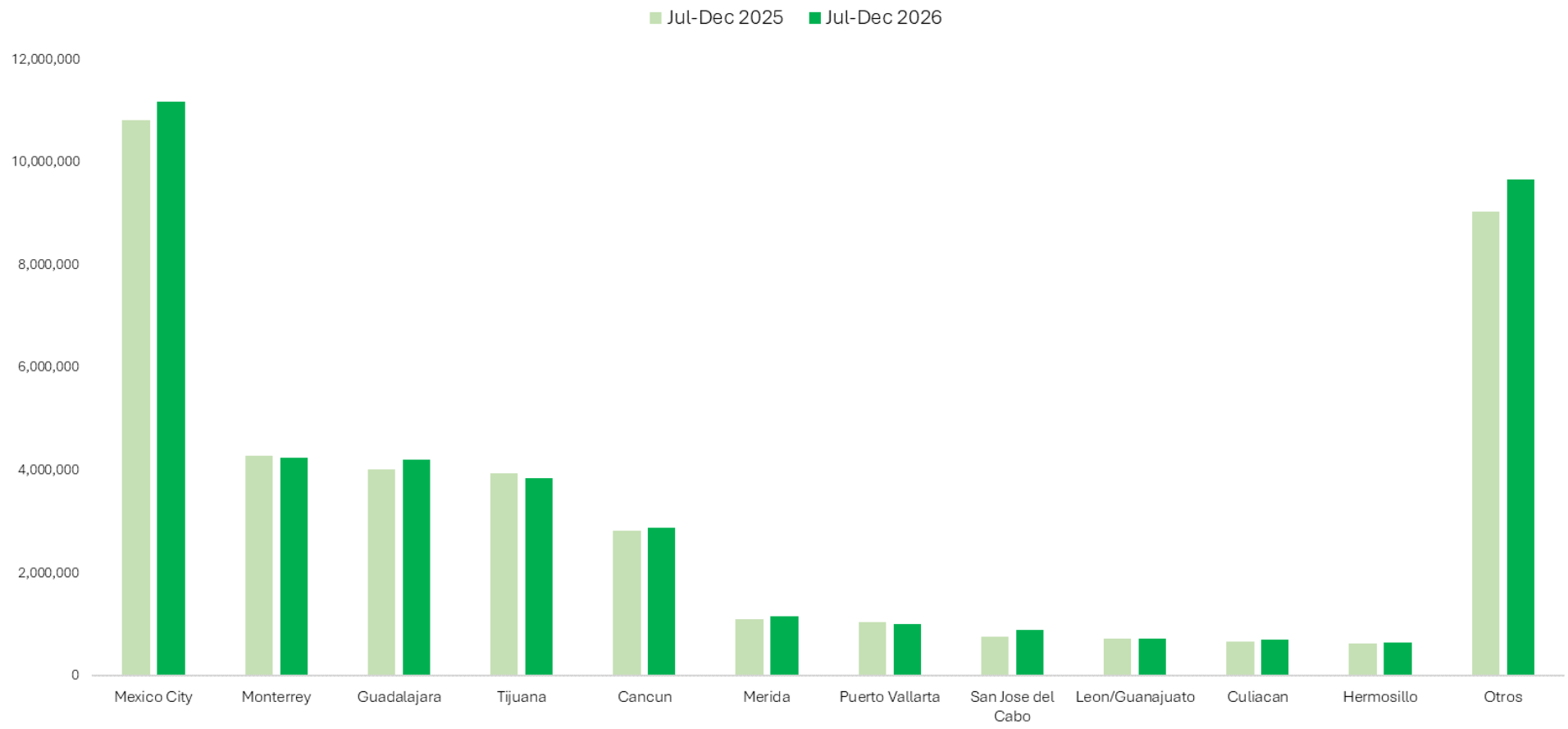
Domestic Seat Scheduling

Seat Scheduling
Jul-Dec 2026
vs Jul-Dec 2025

CDMX
11.2 million
+3.2%

Monterrey
4.2 million
-1.0%

Guadalajara
4.2 million
+4.9%



Seat scheduling for the last week of June 2025 and 2026, respectively.

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

Seat Scheduling
Jul-Dec 2026
vs Jul-Dec 2025

U.S.
11.4
million
-6.4%

Dallas
1.5 million
-6.0%

Los Ángeles
1.3 million
-8.6%

Houston
1.5 million
-5.0%

Chicago
0.9 million
+4.1%

Canada
1.7
million
+14.9%

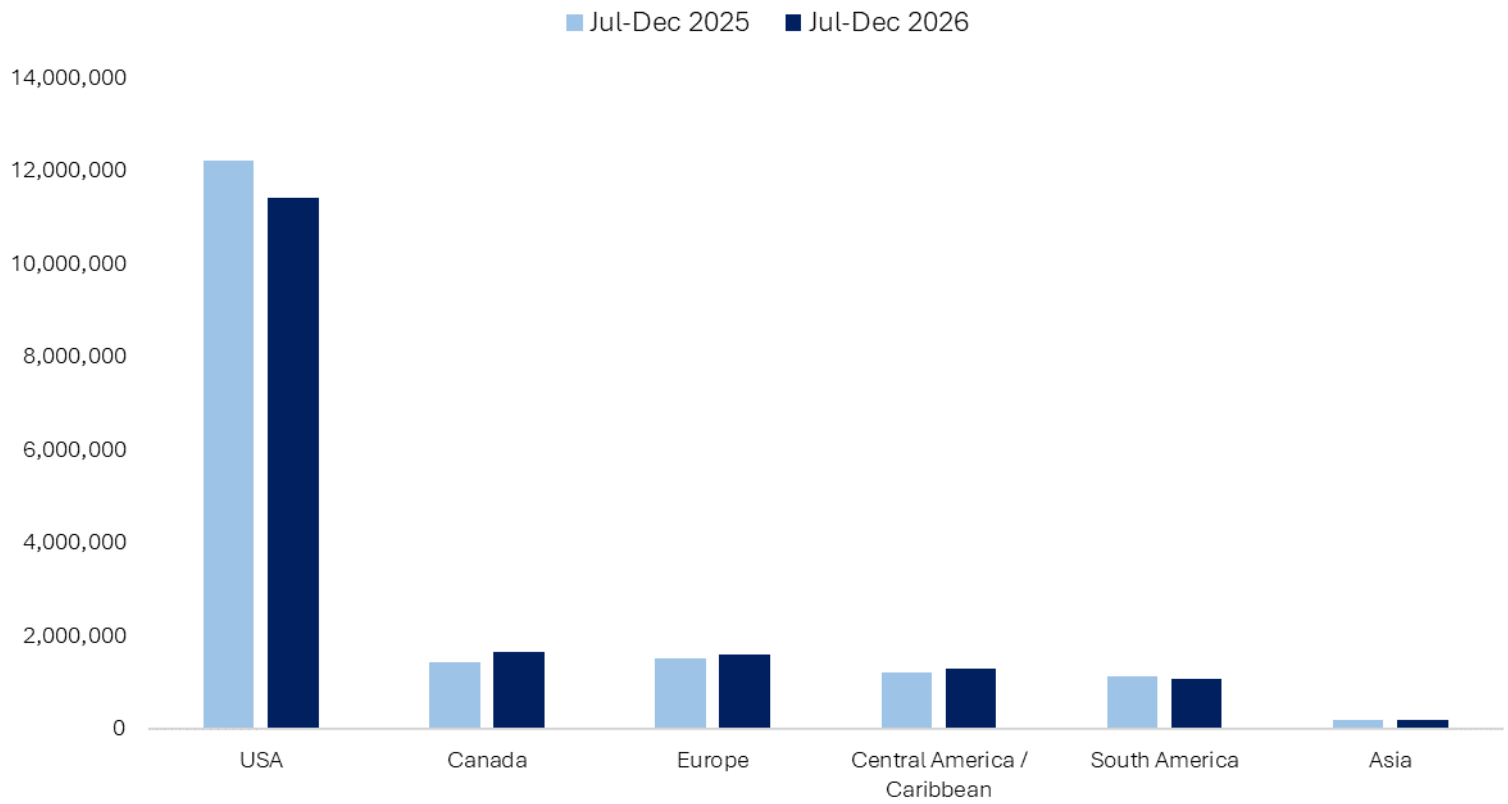
Toronto
583 thousand
+14.9%

Vancouver
300 thousand
+5.7%

Montreal
277 thousand
+7.3%

Calgary
221 thousand
+19.4%

International Seat Scheduling to Mexico



Seat scheduling for the last week of June 2025 and 2026, respectively.

Source: OAG

LOS CABOS
TOURISM OBSERVATORY

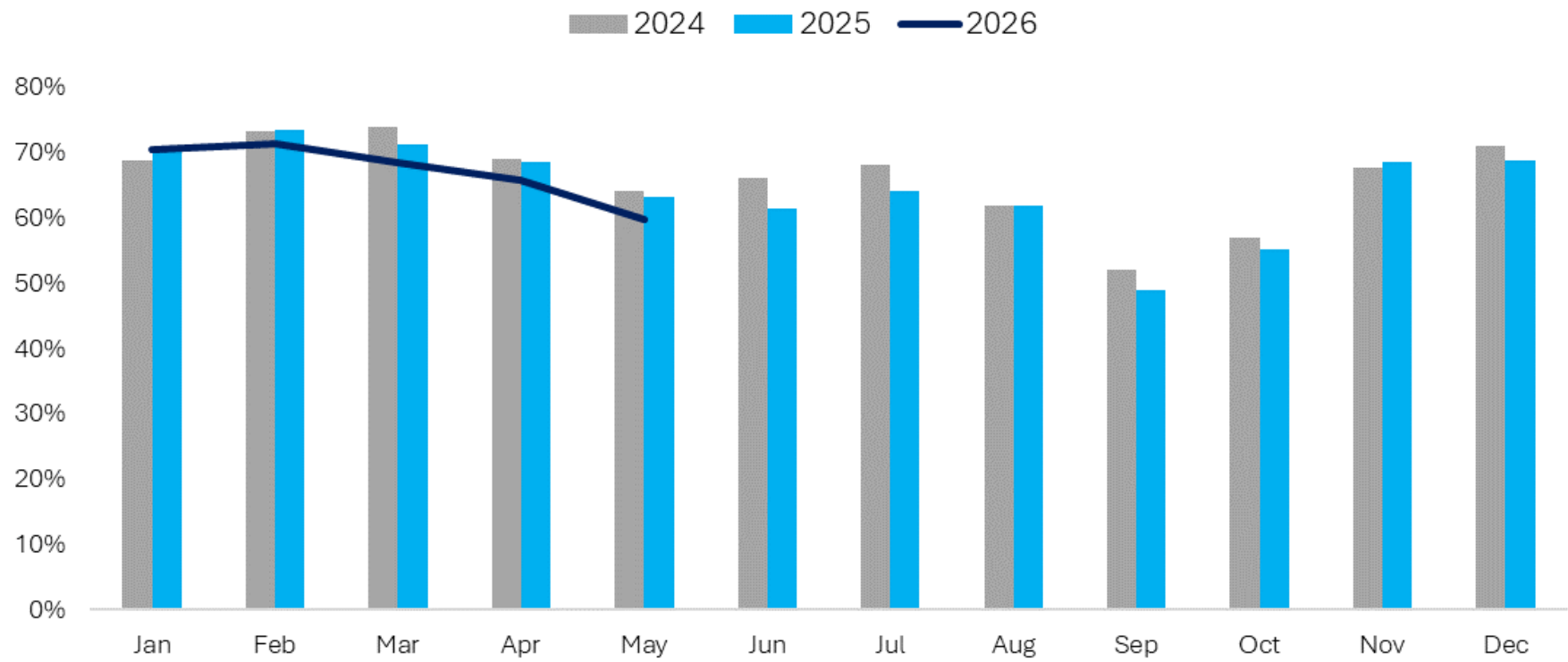
May-2026
vs May-2025

Average Occupancy

59.8%

-3.4pp

Hotel Occupancy, Beach Destinations (Weekly)



- Monitored destinations: traditional beach destinations, integrally planned resorts, and other destinations (Cancún, Los Cabos, Puerto Vallarta, Huatulco, Acapulco).

Source: Timely Report of Beach Destinations- DATATUR

LOS CABOS

TOURISM OBSERVATORY

APPENDICES

METHODOLOGICAL NOTES, DEFINITIONS, ACRONYMS AND SOURCES



LOS CABOS

TOURISM OBSERVATORY

Methodological Notes

1. This refers to passengers on domestic and international flights arriving at SJD. This source (GAP) does not distinguish the nationality of passengers, but rather the origin of the flight. In its monthly reports, GAP publishes the total number of passengers who used its facilities, so the number reported in the Observatory corresponds to half (arrivals).

2. SJD's private aviation operations are reported by GAP, while CSL's operations are reported by INM. The second source has a one-month delay, while the first is reported approximately 10 days after the end of each month.

3. The difference between the information reported by the INM and that reported by the Pacific Airport Group (GAP) is that the former refers to the visitor's country of nationality. Only those tourists who have entered Mexico through Los Cabos airport are considered. It indicates the number of people who entered the country through Los Cabos airport, while the second reports the total number of passengers on domestic or international flights, without specifying whether the passengers are of a particular nationality. In the case of the INM, if a tourist entered the country via Mexico City airport and then flew to Los Cabos on a domestic flight, they will appear in the Mexico City statistics

4. .Flight seat reservations to SJD based on the following global distributors (GDSs): SABRE, Amadeus, Worldspan, and Us. The information reported by ICF does not necessarily represent tickets purchased and only covers a fraction of the global distributors. Other sources included in the observatory (IATA-GAP) report, in contrast, airline ticket purchases through travel agencies. Therefore, they will not match.

Number of passengers who purchased their airline ticket through a travel agency. This allows the origin of the passenger to be identified, i.e., the point of departure of the ticket. The information reported by IATA-GAP therefore considers different concepts than those reported by ICF (see note 11), which refer to reservations made through certain globalizers.

IATA-GAP applies only to passengers who have purchased through an IATA-affiliated travel agency. Not to be confused with the GAP source, which corresponds to SJD airport operations.

5. IATA-MIS reports the passenger's first airport of origin and the number of stopovers made to reach their destination, unlike AFAC or IATA-PAXIS, which shows the last airport used to reach the destination. For example, if a passenger travels from Toronto to Los Cabos and made a stopover in Los Angeles, IATA-MIS shows the first origin (Toronto), while in AFAC statistics, the passenger is recorded in the statistics for Los Angeles as the point of origin.

The difference between the number of passengers reported by each of the aforementioned sources may vary for different reasons. When selecting in IATA-MIS, only visitors are filtered, i.e., travelers who began their journeys outside the Los Cabos airport. If a Los Cabos resident takes a flight and then returns, they will not appear in the IATA-MIS database (as long as this filter is applied) but will appear in AFAC or GAP. Since IATA counts purchased tickets, it may not consider crew or complimentary tickets that may appear in AFAC or GAP.

6. OAG collects information provided by airlines on flight schedules to Los Cabos on an ongoing basis and updates its system continuously, reporting what airlines have planned before a period and then reporting the total number of seats available. As a result, the number of seats available published in a given month may differ from the actual number of seats available.

7. It only includes data corresponding to members of the Los Cabos Hotel Association (AHLC), and for this reason may not match other sources such as the total reported by DATATUR and/or STR-Costar, which have smaller samples. The AHLC covers on average more than 77% of the universe of hotels in Los Cabos, which is usually higher for this reason.

Methodological Notes

8. Only data included in AHLC reports is reported. In some months, rates for timeshares or all-inclusive resorts are not reported, nor is data for certain months. In some graphs, the average reference value for Los Cabos uses a secondary axis, so the proportion with the average rate is higher.

9. This refers to properties offered for accommodation through the online platforms Airbnb, Vrbo, and HomeAway in Los Cabos, including the three sub-destinations (Cabo San Lucas, San José del Cabo, and Scenic Rute) and the rest of the destination.

10. Average travel prices in US dollars for one person, including round-trip economy class airfare (direct or maximum one stopover), plus the cost of accommodation for 4 days and 3 nights in 6- and 7-star hotels, arriving on Thursday and departing on Sunday. To obtain the cost of accommodation, a sample of hotels within the indicated categories was selected, which operate in Los Cabos and/or competing destinations. These include: Barceló Hotels, DoubleTree by Hilton, Dreams (AM Resorts), Hard Rock Hotel, Hilton, Hyatt Regency, JW Marriott, Riu, Secrets (AM Resorts), Sheraton, The Ritz Carlton, Viceroy, W by Marriott, and Westin.

    For the domestic market, a purchase period of two months prior to the travel date is considered, i.e., purchase date in January for travel during the month of March. For the international market, a purchase period of four months prior to the travel date is considered.

11. The information provided by STR-Costar and AHLC is not necessarily comparable. The former works with a sample covering 26% of the universe, while the latter covers more than 77%.

12. Interest over time: the maximum value on the graph is 100. The values on the graph do not represent absolute search volume but are indexed on a scale of 1 to 100, with each point on the graph divided by the highest point (100). For example, if a period of the last 30 days is set, the highest search point is assigned a value of 100 and the rest are distributed proportionally.

13. Related topics: refers to other things that are of interest to people searching for the main term. It allows you to identify subcategories or interests related to the main term. Related queries: these are specific searches, i.e., what other words or phrases users used that include the term being analyzed.

Definitions

- **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 (professional, cultural, sports, religious, social, governmental, or academic, among others). 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.

Definitions

- **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/ΣHt, where It is equal to the total revenue generated by rooms in a period t. and ΣHt 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 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.

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Acronyms and Sources

Acronyms

- **CSL:** Aeropuerto Internacional de Cabo San Lucas
- **DFW**: Aeropuerto Internacional Dallas Fort Worth
- **HOU**: Aeropuerto William P. Hobby, Houston
- **LAX:** Aeropuerto Internacional de Los Ángeles
- **PHX**: Aeropuerto Internacional de Phoenix Sky Harbor
- **SJD:** Aeropuerto Internacional de Los Cabos
- **YEG**: Aeropuerto Internacional de Edmonton
- **YVR**: Aeropuerto Internacional de Vancouver
- **YYC**: Aeropuerto Internacional de Calgary
- **YYZ:** Aeropuerto Internacional de Toronto-Pearson

Sources

- Asociación de Hoteles de Los Cabos (AHLC)
- Asociación Internacional de Transporte Aéreo (IATA)
- Agencia Federal de Aeronáutica Civil (AFAC)
- AirDNA
- Aeropuertos del Sureste (ASUR)
- Banco de México (BANXICO)
- Cvent
- Expedia.com
- Fideicomiso Turístico de Los Cabos (FITURCA)
- Google Trends
- Grupo Aeroportuario del Pacífico (GAP)
- ICF International
- Instituto Nacional de Migración; Sistema Integral de Operación Migratoria (INM-SIOM)
- Multiple Listing Service (MLS)
- Official Airline Guide (OAG)
- Secretaría de Turismo, Sistema Nacional de Información Estadística del Sector Turismo en México (DATATUR)
- STR-COSTAR

LOS CABOS TOURISM OBSERVATORY

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