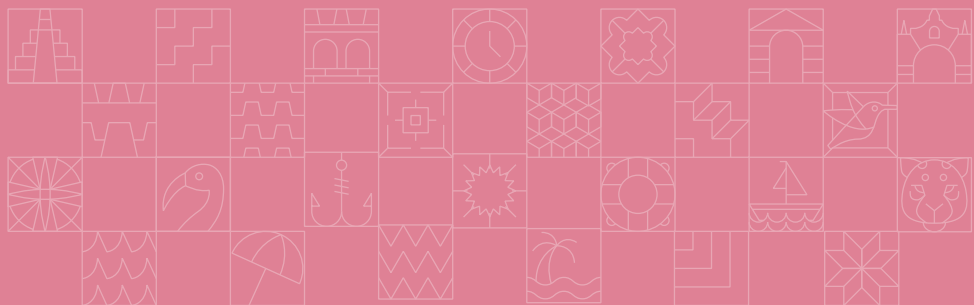




Yucatan Tourism Observatory

REPORT 2023





Yucatan Tourism Observatory

Report 2023

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Abstract

In accordance with the rules established for the operation and management of the **International Network of Sustainable Tourism Observatories (INSTO)** of UN Tourism, the following is the **First Annual Report of Activities and Follow-up Results of the Yucatan Tourism Observatory (YTO)**, which as of January 2023 has been accepted as a member of this network.

The state of Yucatan, located in the southeast of Mexico, is one of the three federal states that make up the Peninsula of the same name, being a region characterized by a great diversity of cultural, natural and water resources, which, together with the predominant traditions and customs, originated by the Mayan, Spanish and contemporary Mexican heritage, currently makes up one of the regions with the greatest tourism development in Mexico.

Since 2018, the YTO was established as a support network to the Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR), which is integrated by the participation of representatives of the public, private, academic and social sectors, linked to the state's tourism industry, under the mission of monitoring, generating, concentrating, processing and disseminating relevant, reliable, updated and continuous information about tourism in the State of Yucatan to support sustainable tourism management.

The purpose of this document is to report on the activities corresponding to the first year of operation of the YTO under the membership of INSTO, in accordance with its Annual Work Plan 2023, approved by the Observatory's Technical Sub-Committee. Among other activities, the first Workshop for the Definition of Sustainable Tourism Indicators was held, aimed at local stakeholders, as well as the implementation of the first Local Satisfaction Study in Four Magical Towns of Yucatan.

Likewise, this report shows the progress registered in 2023, regarding the monitoring in Yucatan of a system of indicators applicable to the 11 key thematic areas for the development of sustainable tourism: 1) tourism seasonality, 2) employment, 3) destination economic benefits, 4) governance, 5) local satisfaction, 6) energy management, 7) water management, 8) waste water management, 9) solid waste management, 10) accessibility and 11) climate action.

Finally, the Annual Report contains the evidence of the promotion and dissemination work, which is essential for the proper use of information generated by the YTO, as well as the main items, actions and goals that will be worked on during 2024, to continue advancing in the commitment to sustainability of the state of Yucatan, Mexico, acquired from its incorporation to the INSTO.

1. Destination Information



1.1. Destination Description

The state of Yucatan is located in the southeast of the Mexican Republic, in the northern part of the Yucatan Peninsula. It is bordered to the north and west by the Gulf of Mexico, to the southeast by the state of Quintana Roo and to the southwest by the state of Campeche. Most of its territory is plain, which was formed as a result of the appearance of a marine platform composed mostly of limestone rock and where cenotes have been formed. The territorial extension of the state is 39,524 square kilometres, which represents 2.0% of the country's surface. The state is made up of 106 municipalities, the capital being the city of Merida.

Yucatan has a privileged geographical location, with a 378-kilometre coastline that includes white sandy beaches. This coastal region of the Gulf of Mexico is home to 12 maritime ports for specific activities such as tourism, commerce and fishing. Because the state is located in the North American region, it is close to Cuba, the western Caribbean and the United States, bordering Central America to the south.

85.5% of the state's surface has a warm sub-humid climate and the remaining (14.5%) has dry and semi-dry climates, located in the northern part of the state. The average annual temperature is 26°C, the average maximum temperature is around 36°C and occurs in the month of May, the average minimum temperature is 16°C and occurs in the month of January. Rainfall occurs in summer, during the months of June to October.

Beaches and bodies of water have developed in the coastal zone of Yucatan, and although there are no superficial aquifers such as rivers, streams or lakes, due to the characteristics of the subsoil,

the storage and movement of underground water through a network of interconnected cavities with fractures, is manifested throughout the length and breadth of the state geography, in the form of caves, water holes and cenotes, which are exposed underground aquifers formed by the total or partial collapse of the calcareous vault.



Yucatan

Located in the southeast of Mexico



Land Area

39,524 Km²
2.0% of the country's territory



Weather

The average maximum temperature is 36°C and the minimum is 16°C



12 maritime ports

For tourism, trade and fishing activities



Coastline

378 km of white sand beaches



LAS COLORADAS, RIO LAGARTOS

1.2. Role of Tourism in the Destination

The state of Yucatan has wide availability of natural, cultural and social resources, which make the destination a nationally and internationally recognized destination. The state stands out for its Mayan cultural heritage, its historical heritage and the preservation of its traditions and customs, which provide it with ample potential for the development of tourism.

Likewise, tourism in Yucatan is positioned as a generator of investments that increase the touristic offer, causing a greater arrival of visitors.

The destination has seven Magical Towns: Espita, Izamal, Mani, Motul, Sisal, Tekax and Valladolid, where one can enjoy the gastronomy, history and culture; likewise, the entity has important tourist resources such as the pre-Hispanic cities of Uxmal and Chichen Itza, which are considered Cultural Heritage of Humanity by UNESCO.

In particular, the archaeological site of Chichen Itza ranks first nationally in terms of number of visitors and is currently recognised as one of the New Seven Wonders of the Modern World.

Tourism's share of the Yucatan economy has been growing steadily. According to data from the National Institute of Statistics and Geography (INEGI), the Gross Domestic Product of Tourism in Yucatan, represents 11.1% of the state's GDP (2019), which places the entity above the contribution of tourism to the National GDP, which is 8.5% and places us in seventh place nationally in the ranking of states in which tourism participates in their economies.



Economic Impact of Tourism in Yucatan

Yucatan Tourism GDP

11.1%

7th place nationally in the ranking of tourism participation in its economy

Economic Growth

82.4%

Evolution of the economic revenue from 2018 to 2023

Economic Revenue

\$715

Millions of Dollars, an increase of 34.9% over 2022

On the other hand, according to information from INEGI's National Occupation and Employment Survey, during the fourth quarter of 2023 the Employed Population in the temporary accommodation and food and beverage preparation sector registered 121,741 people, which represents an increase of 11.2% with respect to that registered for the same period in 2019 (109,490 people).

It is worth mentioning that the population in this sector contributes 10.1% of the total employed population in the state, which speaks of the relevance of the tourism sector in the generation of employment. Derived from the above, it is important to highlight that 60.9% of the people working in the hotel and food and beverage industry are women.

According to estimates by the Secretariat of Tourism Development of the Government of the State of Yucatan, during 2023 tourism activity in the state generated an economic revenue of \$12,869 million pesos (\$715 million dollars), which represents an increase of 34.9% over 2022.

2. Annual Results Report

W. Rosa Mexicano
Valladolid Yuc.



2.1 Tourism Development in Destination

Tourism in the State of Yucatan is currently showing unprecedented dynamism and growth. After facing the extraordinary challenge posed by the pandemic, the main tourism indicators in the state show a remarkable recovery that in most cases has surpassed the figures of 2019, the last record year before the pandemic. Below are some data that support this statement. During 2023, overnight visitor arrivals to the state of Yucatan reached 2.4 million visitors, 14.2% higher than in 2022 (2.1 million people) and 34.2% higher than the tourist arrivals observed in 2018 (1.79 million visitors) (see appendix 3.5, graph 1).

This figure for tourist arrivals to the state of Yucatan in 2023 is historic, being the highest observed since 2003 when the measurement began through the DataTur Hotel Monitoring Programme, mainly sustained by the arrival of domestic tourism (internal), which currently represents 81% of the tourism market in Yucatan and presented an outstanding growth of 40% with respect to 2018.

In 2023, average hotel occupancy rate in state will stand at 56.4%, which is 4.0 percentage points higher than occupancy indicator recorded in 2022 (52.4%) and 1.4 percentage points above level of hotel supply utilisation observed in state during 2018 (55.0%) (see appendix 3.5, Graph 2). It should be noted that in the case of the City of Merida, the capital and main tourist centre of the state, during 2023 hotel occupancy rate reached an average of 58.5%, which represents an increase of 5.2 percentage points with respect to the occupancy recorded in 2022 (53.3%) (see appendix 3.5, graph 2).

In this context, it is relevant to mention the remarkable growth of the available accommodation supply in Yucatan, which went from 498 hotels with 13,442 rooms registered in December 2018 to a figure of 649 hotels and 16,483 rooms accounted for in December 2023, which implies an increase of 22.6% in the number of rooms available (see appendix 3.5, graph 3). It should be noted that this growth is diversified both in Merida and in the interior of the state.



2.4 million

Overnight Visitors in 2023
14.2% more than in 2022



56.4%

Hotel Occupancy Rate 2023
4% higher than recorded in 2022



22.6%

More in 2023 the lodging supply in
Yucatan increased than 2022



2.99 million

Excursionist to archaeological and
ecological zones saw an increase of
1.1% between 2023 & 2022



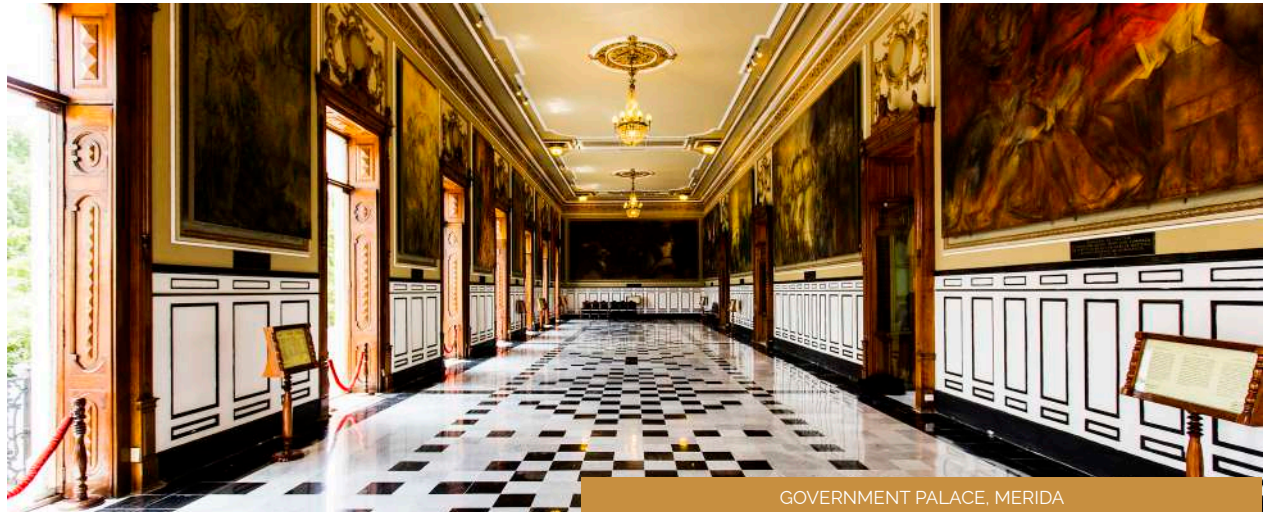
3.7 million

Air passengers (arrivals/departures)
19.3% more in 2023 than in 2022



261 thousand

Cruise passengers
3.5% increased between 2023 & 2022



GOVERNMENT PALACE, MERIDA

Likewise, in 2023 the economic revenue generated by tourism in Yucatan reached a record \$715 million dollars, which represents a variation of 34.9% with respect to the previous year (\$475.2 million dollars) and an increase of 82.4% with respect to 2018 (\$366.5 million dollars) (see appendix 3.5, Graph 4).

In terms of lodging tax collection, during 2023 a figure of \$9.4 million dollars was achieved, representing a 17.1% growth compared to that recorded during 2022 (\$8.0 million dollars) (see appendix 3.5, graph 5). Additionally, the hotel revenue reported in 2023 stood at \$187.5 million dollars, which represents a growth of 91.0% compared to 2018.

On the other hand, in the same year, the number of visitors to the state's archaeological and ecological zones reached 2.99 million people, an increase of 1.1% over the figure recorded in 2022 (2.96 million people) (see appendix 3.5, graph 6), while Chichen Itza maintained its position as the most visited archaeological zone in Mexico.

In terms of MICE: (Meetings, Incentives, Conferences and Exhibitions), in 2023 this segment received 259 mice events in the entity, of which 197 are national and 62 are international, which together registered an accumulated 103.3 thousand participants (61.2% national and 38.8% international), representing a growth of 65.0% compared to 2022 (62.6 thousand participants) and a variation of 23.6% compared to what was registered in 2018 (83.5 thousand participants) (see appendix 3.5, graph 7).

In terms of air connectivity, during 2023 the International Airport of the City of Merida 'Lic. Manuel Crescencio Rejon', after a significant private investment of \$142.4 million dollars made by Grupo ASUR, significantly expanded its facilities, which went from a capacity of 2.0 million passengers to being able to serve up to 4.7 million passengers.



Because of the above, in the same year this air terminal recorded a cumulative movement of 3.7 million passengers (in arrivals and departures), which implies a growth of 19.3% over the previous year (3.1 million pax). Likewise, this figure represents a 50% growth compared to the movement recorded in 2018 (2.5 million pax) (see appendix 3.5, graph 8).

Therefore, 2023 is a record year for passenger movements at Merida City International Airport, being the highest in its history. It is also important to note that Merida Airport currently ranks eighth in air passenger arrivals at the national level.

In terms of maritime connectivity, in 2023, 75 cruise ships with 261,000 passengers were expected to arrive, which means an increase of 3.5% in the number of passengers with respect to the year 2022 (252,000 passengers) (see appendix, graph 9), which demonstrates a recovery in the confidence of the shipping lines in this destination. Currently, the Port of Progreso occupies seventh place in the number of cruise passengers in Mexico.

2.2 Changes and Trends in Tourism Activity in Yucatan after the Pandemic

The behavior of tourism flows in Yucatan, as in the rest of the world, registered important adjustments and changes after the pandemic that occurred during the period 2020-2022, with its lowest point regarding the flow of visitors during 2020. Faced with the pandemic, tourism adapted to the restrictions on mobility and maximum capacity of services established by the health authorities, which undoubtedly affected this activity, which essentially depends on travel and social interaction.

In this sense, as discussed in the previous section, 2023 was a year of recovery of tourism activity in Yucatan, reaching pre-pandemic levels in 2019, even surpassing that year's growth in some key indicators, as was the case of domestic tourist arrivals in Yucatan. This could confirm, to some extent, the resilience of tourism in the case of the state.

Although some market segments, such as meeting tourism, nautical tourism and cruises, as well as the arrival of international tourists to the destination, are still in the process of recovery to reach their previous levels, the pandemic undoubtedly marked a change in the consumption trend of tourists, who in principle gave preference to shorter trips, towards closer destinations, favoring outdoor activities and contact with nature and reducing - at least in principle - the influx to mass events. Likewise, the use of technological tools to access the tourism offer at the destination and the application of social networks to recommend and share travel experiences has been on the rise.





But undoubtedly the most important trend that is impacting tourism behavior is sustainability. Tourists are now more aware of the social and environmental impact of their trips, in particular the impact on climate change, thus going beyond the economic aspect of travel. The impact on local communities and the benefits generated by tourism activity are also becoming more relevant.

In this sense, tourism products that allow the generation of authentic experiences, contact with nature, coexistence with traditions and customs, related to health and wellness activities, as well as personalized trips, are becoming more relevant among tourists' preferences.

Some of these changes are more visible in segments such as meeting tourism in Yucatan, where the use of technological tools favored the implementation of digital and hybrid events, reduced the size of groups for face-to-face events and favored the growth of the national market; Likewise, meetings now present a trend that favors the realization of "green" events, where the minimization of the carbon footprint of attendees is evaluated, resulting in the impact on decisions such as the selection of the venue, food services, transportation and the provision of materials, based on the care of the environment.

Accessible or inclusive tourism is another trend that is growing and demands specialized services to which the current offer must be adapted, as it requires the existence of adequate facilities, training of service personnel, the creation of adequate information and signage, and friendly transportation, among other characteristics aimed at facilitating recreational, tourist and cultural activities for people with or without disabilities and their travel group.

Likewise, the inversion of the population pyramid in Mexico, predicted for the coming years, with the consequent impact on the increase in the age

of most of the population, will lead to a demand for increasingly specialized tourism services, aimed at people over 65 years of age.

In the particular case of the destination, changes in the trend have also favored the segments of health/wellness tourism and romance tourism.

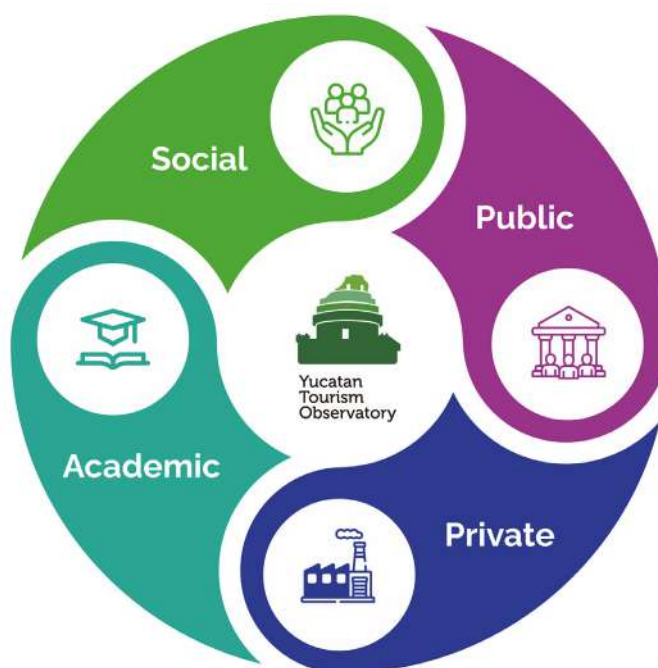
In the case of the former, the existence in Yucatan of high quality specialized health services, recognized nationally, combined with the cultural and tourist offer, have favored the growth of this market.

For its part, romance tourism finds in Yucatan's offer an incomparable scenario for weddings, honeymoon trips or other related social events, which attract visitors from different parts of the country and the world. This, combined with the luxury tourism offer in the state, complements the appropriate scenario for this segment.

In Yucatan there is potential for growth in other specific niches of tourism: LGBT, educational, sports, solidarity and religious, which, although they are already present in the state, they are still incipient and have the capacity for further expansion in the medium and long term. However, in all cases, they require an adaptation of the existing offer to provide an adequate service.

Finally, a visible trend in some Yucatan communities has been the rejection of mass tourism and the arrival of foreign investment, favoring local development, a situation that has occurred, for example, in the case of the Magical Town of Sisal (municipality of Hunucma), where the population has more consciously questioned the impact of tourism on their daily lives.





2.3 Role of the Observatory

The YTO's objective is to generate and integrate relevant information that allows the constant monitoring and analysis of reliable, relevant and updated tourism indicators, for the development of strategies that contribute to improve the competitiveness of the destinations in the State of Yucatan and contribute to decision-making in the public, private, academic and social sectors for a more sustainable practice of tourism.

2.3.1. Objective

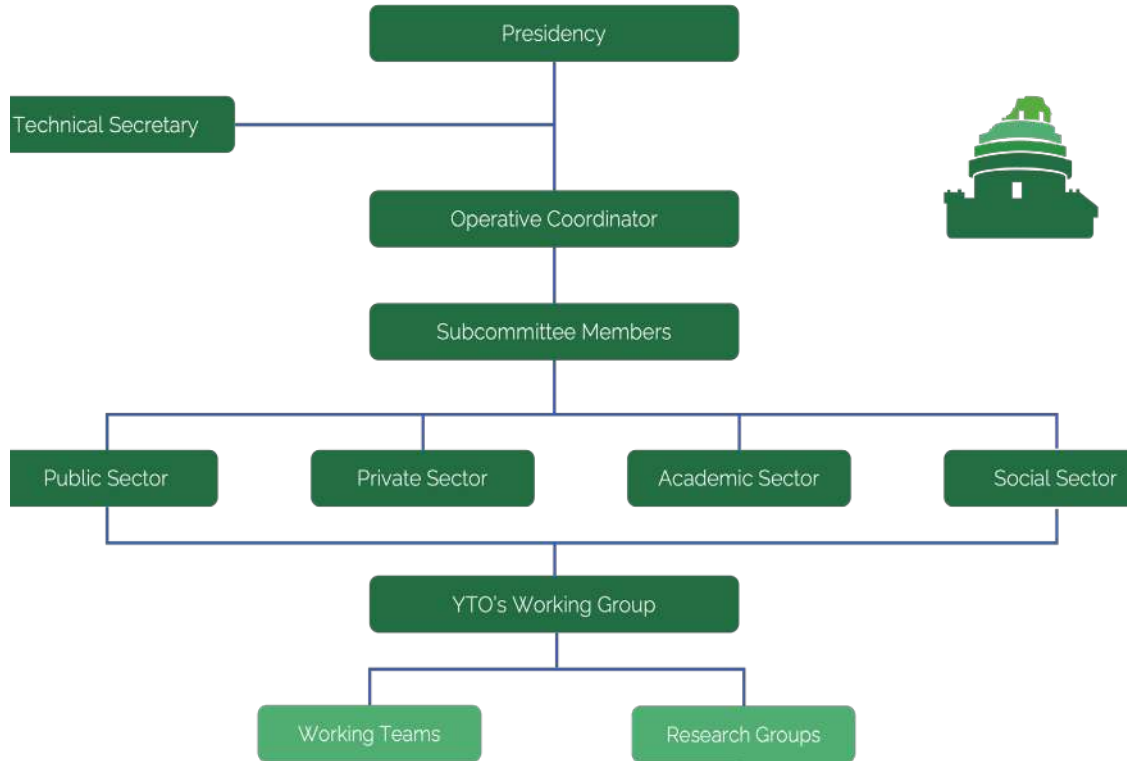
Who are we?

It is currently formed as a support network to the Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR), which is integrated by the participation of representatives of the public, private, academic and social sectors, linked to the tourism industry of the State.

Therefore, in order to achieve all the results presented in this report, the responsible participation of the sectors was required, through the creation of solid alliances and cooperation among them.

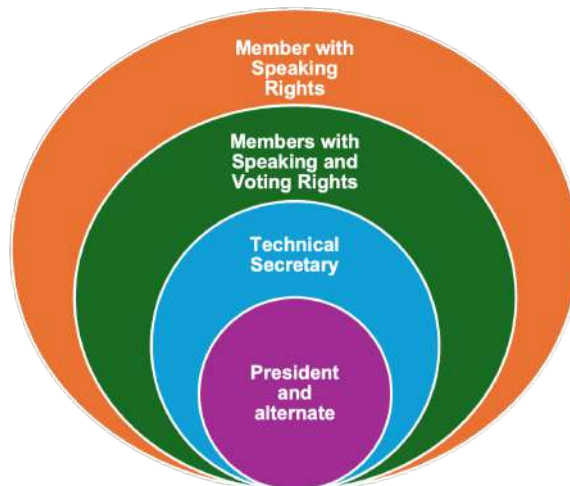
2.3.2 Operation of the Technical Subcommittee

The Yucatan Tourism Observatory (YTO) has the following organizational structure for its operation:

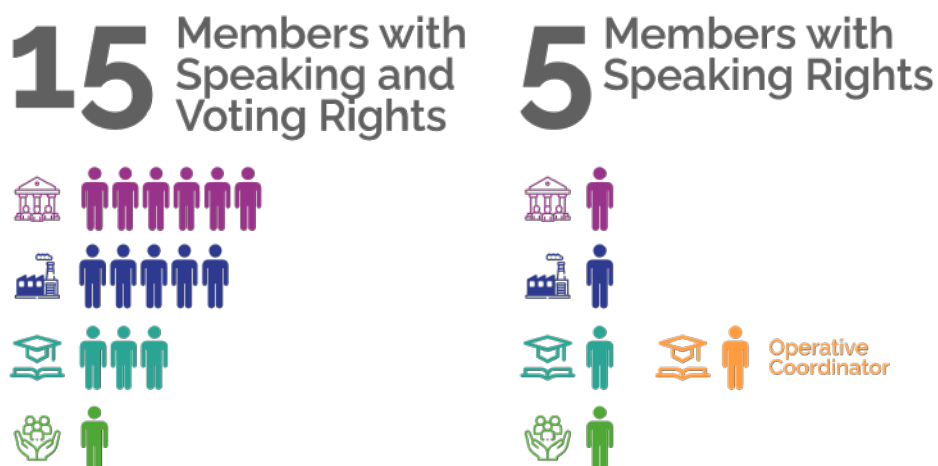


In appendix 3.2 of this report, you will find the list of public, private, academic and social organizations that are integrated into this YTO Subcommittee.

According to the YTO's internal regulations, the subcommittee is integrated as follows:



Stakeholder participation is distributed as follows:



It should be noted that during 2023, the YTO held two ordinary sessions of the Technical Subcommittee, under the virtual modality, in order to present its annual work plan, progress and achievements of the activities proposed and projects generated.

In this regard, the first regular meeting of the Technical Subcommittee was held on June 13, 2023, with the presence of 11 members with the right to speak and vote and 6 members with the right to speak, with the purpose of presenting the progress of the annual work plan.

The second ordinary session was held on December 14, 2023, with the participation of 11 members with the right to speak and vote and 6 members with the right to speak, in order to present the results of the actions implemented by the YTO.

The Yucatan Tourism Observatory (YTO) carries out its activities based on an Annual Work Plan, so the following is a description of the results achieved during 2023.

2.3.3 Activities for the year

YTO's 2023 annual work plan was grouped around four main axes: 1) Coordination and Follow-up Activities; 2) Studies and Projects; 3) Dissemination and Liaison; and 4) INSTO Activities.



In the first axis **“Coordination and Follow-up Activities”** the annual work plan was implemented (see appendix 3.1); the realization of two calls for ordinary sessions for the Technical Subcommittee; 3 methodological reviews of the defined products, as well as the creation of 3 progress reports of delivered results and the definition of the Calendar of Ordinary Sessions of the Technical Subcommittee of the YTO for the fiscal year 2024.

In the second axis **“Studies and Projects”** the first Diagnosis of the Satisfaction of the Residents on the Tourist Activity developed in four Magical Towns of Yucatan: Izamal, Mani, Sisal and Valladolid, with the purpose of knowing the perception and the degree of well-being that the inhabitants of the selected towns have with respect to the tourism phenomenon that occurs in their place of residence. This project was financed by public resources and executed by a team of academics from the Universidad Autonoma de Yucatan (UADY). A summary of the main findings of this study can be found in Appendix 3.7 of this document.

Likewise, as part of the activities of this axis, a promotional video of the YTO was generated.

In the third axis **“Dissemination and Liaison”**, an unparalleled exchange of experiences was achieved, as the following actions were implemented: virtual participation with a presentation at the Second INSTO Insights Web Seminar: Measuring Tourism Seasonality at the Destination Level (January, 2023); virtual meeting to support the project to create the Sinaloa Observatory (March, 2023); virtual meeting with the Tourism Observatory of Bucaramanga, Colombia (April, 2023); participation in the Second Working Group of the Tourism Observatory of Puebla (April, 2023); participation in the Inauguration

of the Michoacan Tourism Observatory (April, 2023); Participation with a presentation at the Tenth National and International Meeting of Tourism Observatories (ENIOT) held in Irapuato, Guanajuato (May, 2023); participation in the Seventh Edition of the Sustainable & Social Tourism Summit, held in Leon, Guanajuato (September, 2023); Virtual presentation of the YTO to members of the Maya World Alliance (September, 2023); participation with a presentation at the "First Meeting of Observatories: Methodologies and Trajectories " held in Xalapa, Veracruz (November, 2023); and virtual participation through a video in the World Meeting of Sustainable Tourism Observatories (INSTO) of the UN Tourism, held in Madrid, Spain (November, 2023) (see appendix 3.8 for photographic evidence of the activities carried out).

Finally, in the fourth axis **"INSTO Activities"**, in compliance with the Rules for the Operation and Management of the International Network of Sustainable Tourism Observatories of the UN Tourism, in its sections vi and vii of its subsection "C", which establishes the need to hold a Stakeholders Workshop during the first year of acceptance as members of the network (YTO has been a member since January 2023), In October 2023, the First Workshop for the Definition of Sustainable Tourism Indicators was organized by the Tourism Observatory of Yucatan and the Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR) in the facilities of the Faculty of Anthropological Sciences of the Autonomous University of Yucatan (UADY).

The purpose of this workshop was to address the following activities as set forth in the aforementioned INSTO Operating and Management Standards a) discuss the findings of the preliminary study; b) reflect and agree on the thematic areas and indicators that the observatory will monitor; c) identify the most important needs, gaps and sources of data; and d) clearly define the roles and responsibilities of the stakeholders and the frequency of stakeholder meetings.

This forum was attended by 63 local participants linked to Tourism, with the objective of discussing and identifying variables that will improve the measurement on the



7TH EDITION OF THE SUSTAINABLE & SOCIAL TOURISM SUMMIT



PARTICIPATION IN THE 10TH ENIOT



PARTICIPATION IN THE 1ST INTERNATIONAL MEETING OF OBSERVATORIES



7TH EDITION OF THE SUSTAINABLE & SOCIAL TOURISM SUMMIT

eleven thematic areas necessary for the development of sustainable tourism. As a result of this workshop, three areas were identified for the Observatory to work on in the following year: the Updating of the Indicator System; the Analysis of the Topics Derived from the Workshop; and the Activation of the Interinstitutional and Interdisciplinary Network.

A summary of the results of this workshop is available in appendix 3.6 of this document.

It should be noted that the strategic project mentioned in axis three corresponds to the fulfillment of the commitment acquired before the UN Tourism INSTO Network to have information on the Local Satisfaction of the Destination, which is one of the mandatory areas of measurement for sustainable tourism.

In a complementary manner, we followed up on the operation of the State Tourism Information System by updating the information base from internal and external sources of the tourism sector in the State of Yucatan, which is available on the website <https://www.observatoryucatan.org.mx/>.

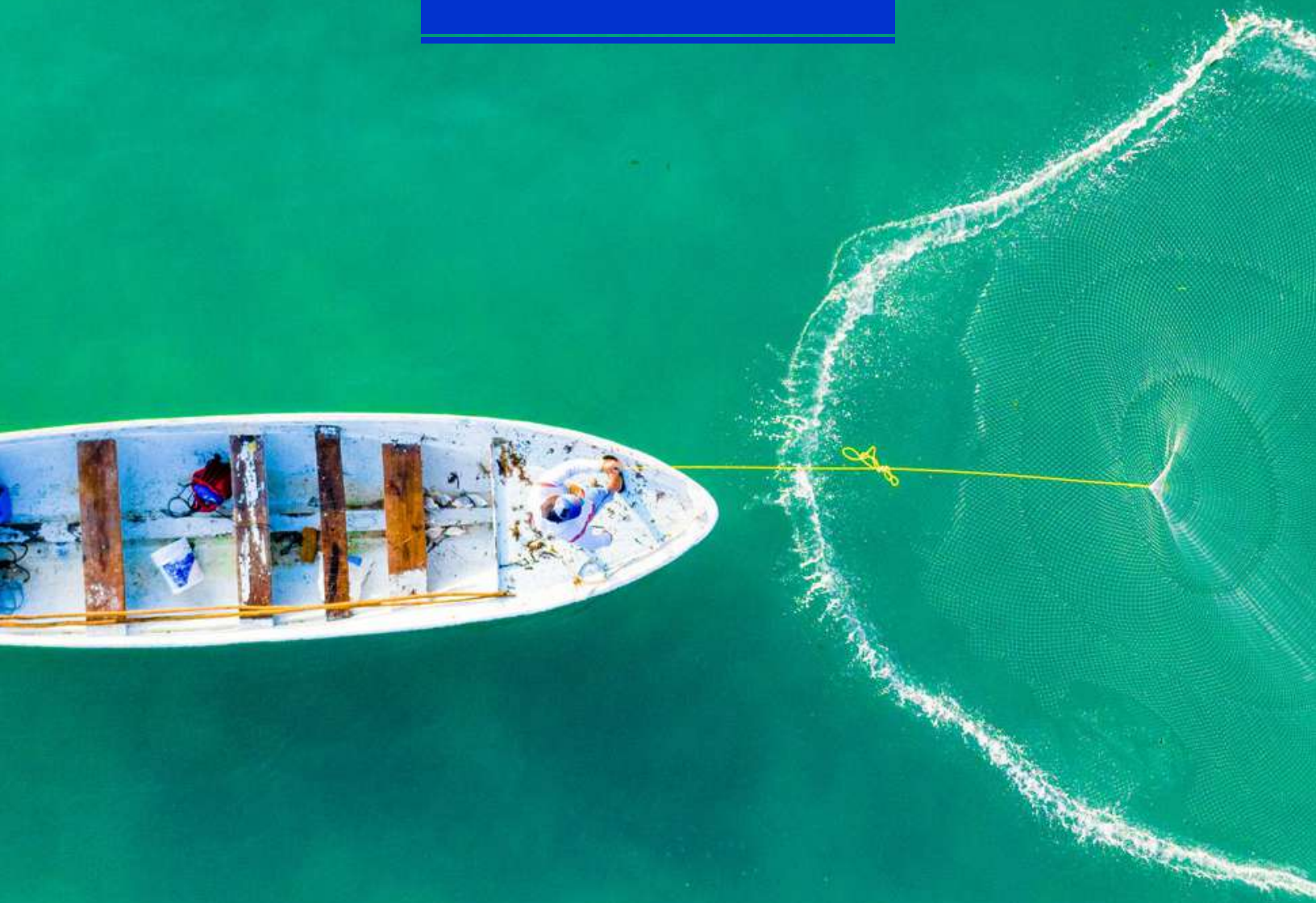
During 2024, this portal will undergo a design update to incorporate the new categories and indicators that follow up on the social, environmental, economic and governance aspects indicated as the INSTO mandatory measurement areas in the State of Yucatan (see dissemination schedule programmed for 2024 in appendix 3.1).

The follow-up and monitoring progress of the YTO indicators linked to each of the INSTO thematic areas for the current year 2023, will be available in the appendix 3.3 section of this document.

Likewise, among the important achievements of this year for the Observatory is its admission as a member of the International Network of Sustainable Observatories (INSTO) of the World Tourism Organization (UN Tourism), being the second in Mexico to achieve this affiliation.

The membership to INSTO also constitutes a commitment for Yucatan to manage a responsible and sustainable tourism development, adopting a holistic vision in the development of appropriate and innovative strategies to rethink this activity.

3. Appendixes



3.1 Working Plan 2023

ACTIVITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Yucatan Tourism Observatory (YTO) Technical Committee Sessions.						●						●
YTO Operative Coordination.			●	●	●	●	●	●	●	●	●	
Updates to data and indicators on the YTO Web site.	●	●	●	●	●	●	●	●	●	●	●	●
Preparation of the Annual Work Plan of the Yucatan Tourism Observatory (YTO).			●	●								
Meetings with the YTO working group and follow up on agreements and projects related to its work plan.				●		●		●				
Annual projects (Preparation and publication).							●	●	●	●	●	●
Follow-up and review of annual projects.			●	●	●	●	●	●	●	●	●	
Prepare a report on the project's progress, containing indicators to evaluate the project's results.				●			●			●		
YTO's events and/or participations.	●	●	●	●	●	●	●	●	●	●	●	●
Review, restructuring and definition of YTO objectives, indicators, participants, procedures and instruments.				●	●	●	●	●	●	●	●	●
Supervision of the mechanisms for disseminating and linking the information generated for the YTO.				●	●	●	●	●	●	●	●	
Update of the YTO Interinstitutional and Interdisciplinary Working Network.				●	●	●	●	●	●	●	●	
YTO Stakeholder Workshop - Definition of Sustainable Tourism Indicators				●	●	●	●	●	●	●	●	
Monitoring of the eleven thematic areas identified as mandatory by UN Tourism and destination-specific indicators.				●	●	●	●	●	●	●	●	●
Annual report on YTO activities and results for the International Network of Sustainable Tourism Observatories (INSTO) of the World Tourism Organization (UN Tourism).												●

3.2 List of YTO Technical Subcommittee Members

Members with Speaking and Voting Rights

President

Secretariat of Tourism Development of the Government of the State of Yucatan SEFOTUR

Technical Secretary

Technical Secretariat for Planning and Evaluation of the State of Yucatan SEPLAN

Public Sector

Secretariat of Economic Development and Labor of the State of Yucatan SEFOET

Secretariat of Sustainable Development of the State of Yucatan SDS

Secretariat of Research, Innovation and Higher Education of the State of Yucatan SIIES

Board of the Cultural and Tourist Service Units of the State of Yucatan CULTUR

Public Trust Fund for the Development of Meeting Tourism in Yucatan FIDETURE

City Hall of Merida

Private Sector

Mexican Hotel Association in Yucatan AMHY

Association of Tourism Promotion Agencies in Yucatan AAPROTUY

National Chamber of Commerce, Services and Tourism in Merida CANACO SERVYTUR MERIDA

National Chamber of Restaurants and Seasoned Food Industry CANIRAC

Yucatan Tourism Business Council CETUR

Academic Sector

Autonomous University of Yucatán UADY

Metropolitan Technological University UTM

Marist University of Mérida UM

Social Sector

Haciendas of the Mayan World Foundation A.C. FHMM

Members with Speaking Rights

Public Sector

National Institute of Statistics and Geography (Southeast Region) INEGI

Academic Sector

University of Oriente de Valladolid UNO

Anahuac Mayab University UNIMAYAB

Private Sector

Business Coordinating Council CCE

Operative Coordination












Autonomous University of Yucatan UADY

3.3 INSTO Thematic Area Monitoring

Introduction: YTO Indicator System

This section will present the results of the monitoring of the indicators that are currently tracked by the Yucatan Tourism Observatory, corresponding to the 11 thematic areas that INSTO indicates as mandatory to achieve sustainable tourism development in the destination, which are part of the YTO's monitoring system and are shown in the following table:

**Current Overview of the Yucatan Tourism Observatory (YTO)
Indicator System for the INSTO Thematic Areas**

Classification	Key Areas of Sustainability	Category	Number of Direct Indicators	Number of Derivative Indicators	Total Indicators
	Tourist seasonality	Economic	21	21	42
	Employment	Social	1	1	2
	Destination Economic Benefits	Economic	10	10	20
	Governance	Governance	7	6	20
		Social	4	3	
	Local satisfaction	Social	1	0	1
	Energy management	Environment	1	1	2
	Water management	Environment	2	1	3
	Waste Water Management (sewage)	Environment	1	0	1
	Solid waste management	Environment	4	1	5
	Accessibility	Environment	4	0	4
	Climate Action	Environment	6	3	9
Total Indicators			62	47	109

The existing system of sustainability indicators of the YTO obtains information from primary sources of information generation of the Secretariat of Tourism Development of the Government of the State of Yucatan, such as the hotel monitoring program DataTur



VA Y VEN PUBLIC TRANSPORTATION SYSTEM

(for quantification of demand) and the Tourism Directory InvenTur (for quantification of supply), which have several years operating in the entity, as well as administrative and statistical records generated by various areas of this agency.

The system is also provided with information from other external sources such as the Secretariat of Sustainable Development of the Yucatan State Government (SDS); the Technical Secretariat of Planning and Evaluation of the Yucatan State Government (SEPLAN); the CULTUR Board; the National Institute of Statistics and Geography (INEGI) and Grupo ASUR (concessionaire of the Merida Airport).

It should be noted that one of the main commitments of YTO's participation in INSTO consists of a permanent effort to review and improve the aforementioned indicators, which will undoubtedly depend on the technical, material and human resources available in the coming years, the progress of which will be reported in subsequent Annual Reports.

As can be seen in the quantification of the table above, of the total of 109 indicators that currently make up the YTO monitoring system, 56.8% are focused on measuring economic indicators (62 indicators); followed by 22.0% of the indicators focused on environmental issues (24 indicators); 11.9% focused on governance issues (13 indicators) and finally 9.2% of the indicators measure social issues (10 indicators).

As a result of the above distribution, it can be said that currently 66% of the indicators measured by the YTO focus on the socioeconomic aspects of sustainable tourism development in Yucatan.

Consequently, the challenge of the YTO for the following years will be to balance the vision of the areas of measurement of the tourism sustainability of our destination, through the incorporation of new and better available indicators, for which the involvement and participation of all the actors involved in the tourism activity of the state will be key.

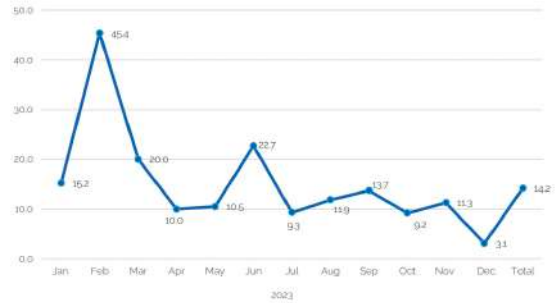
The following are the quantitative results of the progress of each of the indicators corresponding to the measurement areas mentioned above, which allow us to know the situation with respect to sustainable tourism development in the state during 2023.

1.1 Total Overnight Tourist Arrivals in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	157,348	181,303	23,955 ▲
February	139,660	203,004	63,344 ▲
March	166,237	199,563	33,326 ▲
April	179,180	197,092	17,912 ▲
May	154,688	170,911	16,223 ▲
June	150,921	185,222	34,301 ▲
July	203,354	222,294	18,940 ▲
August	190,090	212,638	22,548 ▲
September	145,741	165,748	20,007 ▲
October	194,169	211,981	17,812 ▲
November	204,661	227,806	23,145 ▲
December	212,717	219,305	6,588 ▲
Total	2,098,766	2,396,867	298,101 ▲

1.2 Percentage Variation in Overnight Visitors to the State of Yucatan to the State of Yucatan 2023 vs. 2022 (%)



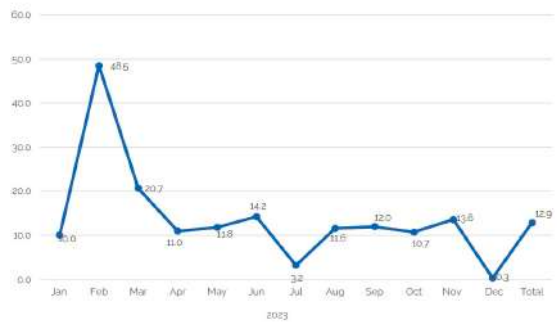
Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.3 Arrivals of Domestic Tourists Staying Overnight in Yucatan

Unit of measurement: Persons

MONTH	2022	2023	DIF.
January	126,169	138,818	12,649 ▲
February	110,943	164,776	53,833 ▲
March	133,806	161,454	27,648 ▲
April	149,158	165,508	16,350 ▲
May	127,157	142,133	14,976 ▲
June	128,751	147,056	18,305 ▲
July	173,818	179,383	5,565 ▲
August	159,102	177,513	18,411 ▲
September	123,601	138,390	14,789 ▲
October	155,726	172,425	16,699 ▲
November	156,528	177,795	21,267 ▲
December	171,202	171,720	518 ▲
TOTAL	1,715,961	1,936,971	221,010 ▲

1.4 Percentage Variation of Domestic Overnight Visitors to the State of Yucatan 2023 vs. 2022 (%)



Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.5 Overnight International Tourist Arrivals in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	31,179	42,485	11,306 ▲
February	28,717	38,228	9,511 ▲
March	32,431	38,109	5,678 ▲
April	30,022	31,584	1,562 ▲
May	27,531	28,778	1,247 ▲
June	22,170	38,166	15,996 ▲
July	29,536	42,911	13,375 ▲
August	30,988	35,125	4,137 ▲
September	22,140	27,368	5,218 ▲
October	38,443	39,556	1,113 ▲
November	48,133	50,011	1,878 ▲
December	41,515	47,585	6,070 ▲
TOTAL	382,805	459,896	77,091 ▲

1.6 Percentage Variation of International Overnight Visitors to the State of Yucatan 2023 vs. 2022 (%)



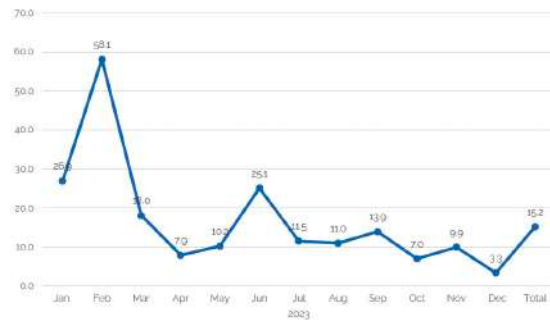
Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.7 Total Overnight Tourist Arrivals in the City of Merida

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	108,713	137,937	29,224
February	100,228	158,431	58,203
March	128,545	151,738	23,193
April	140,333	151,405	11,072
May	121,660	134,102	12,442
June	122,395	153,129	30,734
July	161,294	179,833	18,539
August	149,496	165,902	16,406
September	116,185	132,330	16,145
October	159,805	170,929	11,124
November	163,664	179,948	16,284
December	165,287	170,822	5,535
TOTAL	1,637,605	1,886,506	248,901

1.8 Percentage Variation of Total Overnight Tourist Arrivals in the City of Merida 2023 vs. 2022 (%)



Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

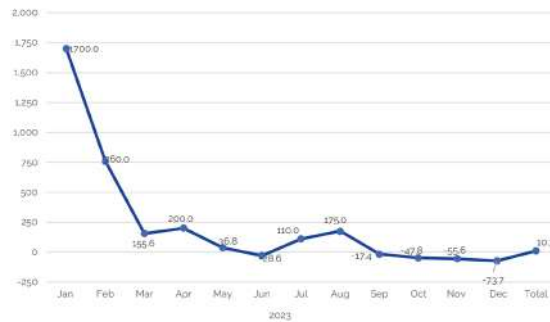
1.9 MICE* Events Held in Yucatan

Unit of Measurement: Events

MONTH	2022	2023	DIF.
January	1	18	17
February	5	43	38
March	9	23	14
April	7	21	14
May	19	26	7
June	28	20	-8
July	10	21	11
August	4	11	7
September	23	19	-4
October	46	24	-22
November	63	28	-35
December	19	5	-14
TOTAL	234	259	25

*Meetings, Incentives, Conferences and Exhibitions.

1.10 Percentage Variation of MICE* Events Held in Yucatan 2023 vs 2022 (%)



*Meetings, Incentives, Conferences and Exhibitions.

Source: Office of Congresses and Visitors (OCV), Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

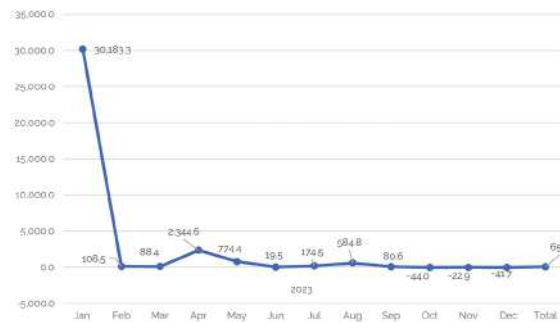
1.11 Total Number of Participants in MICE* Events Held in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	6	1,817	1,811
February	3,194	6,660	3,466
March	5,178	9,757	4,579
April	451	11,025	10,574
May	2,433	21,274	18,841
June	8,343	9,970	1,627
July	2,696	7,400	4,704
August	520	3,561	3,041
September	4,461	8,058	3,597
October	13,273	7,434	-5,839
November	18,490	14,263	-4,227
December	3,557	2,075	-1,482
TOTAL	62,596	103,294	40,698

*Meetings, Incentives, Conferences and Exhibitions.

1.12 Percentage Change in the Number of Participants in MICE* Events Held in Yucatan 2023 vs. 2022 (%)



*Meetings, Incentives, Conferences and Exhibitions.

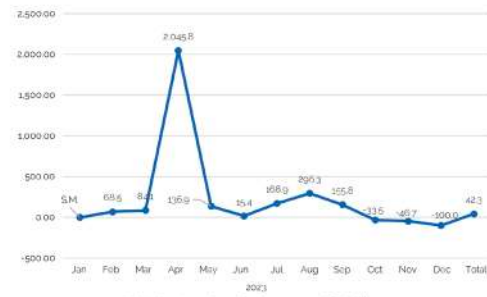
Source: Office of Congresses and Visitors (OCV), Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

1.13 Domestic Participants in MICE* Events Held in Yucatan
Unit of measure: Persons

MONTH	2022	2023	DIF.	
January	-	1,767	1,767	▲
February	3,194	5,381	2,187	▲
March	4,618	8,500	3,882	▲
April	319	6,845	6,526	▲
May	1,573	3,727	2,154	▲
June	8,043	9,280	1,237	▲
July	2,696	7,250	4,554	▲
August	520	2,061	1,541	▲
September	2,622	6,708	4,086	▲
October	7,608	5,060	-2,548	▼
November	12,488	6,650	-5,838	▼
December	742	-	-742	▼
TOTAL	44,423	63,229	18,806	▲

*Meetings, Incentives, Conferences and Exhibitions.

1.14 Percentage Variation of Domestic Participants in MICE* Events Held in Yucatan 2023 vs. 2022 (%)



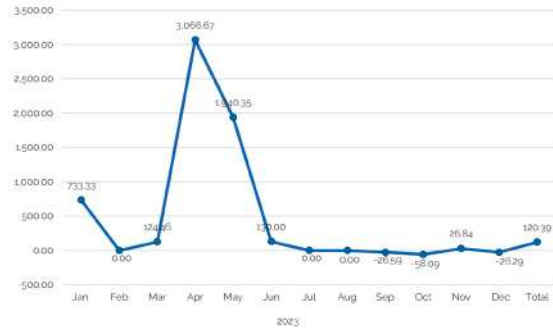
Source: Office of Congresses and Visitors (OCV), Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

1.15 International Participants in MICE* Events Held in Yucatan
Unit of measure: Persons

MONTH	2022	2023	DIF.	
January	6	50	44	▲
February	0	1,279	1,279	▲
March	560	1,257	697	▲
April	132	4,180	4,048	▲
May	860	17,547	16,687	▲
June	300	690	390	▲
July	0	150	150	▲
August	0	1,500	1,500	▲
September	1,839	1,350	-489	▼
October	5,665	2,374	-3,291	▼
November	6,002	7,613	1,611	▲
December	2,815	2,075	-740	▼
TOTAL	18,179	40,065	21,886	▲

*Meetings, Incentives, Conferences and Exhibitions.

1.16 Percentage Variation of International Participants in MICE* Events Held in Yucatan 2023 vs 2022 (%)



Source: Office of Congresses and Visitors (OCV), Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

1.17 Average Length of Stay of Visitors in Yucatan
Unit of measure: Days

MONTH	2022	2023	DIF.	
January	1.56	1.73	0.17	▲
February	1.52	1.55	0.03	▲
March	1.63	1.66	0.03	▲
April	1.62	1.69	0.07	▲
May	1.59	1.64	0.05	▲
June	1.65	1.58	-0.07	▼
July	1.5	1.69	0.19	▲
August	1.66	1.7	0.04	▲
September	1.71	1.57	-0.14	▼
October	1.58	1.48	-0.10	▼
November	1.62	1.59	-0.03	▼
December	1.71	1.52	-0.19	▼
TOTAL	1.61	1.62	0.01	▲

1.18 Percentage Variation of the Average Length of Stay of Visitors in Yucatan 2023 vs 2022



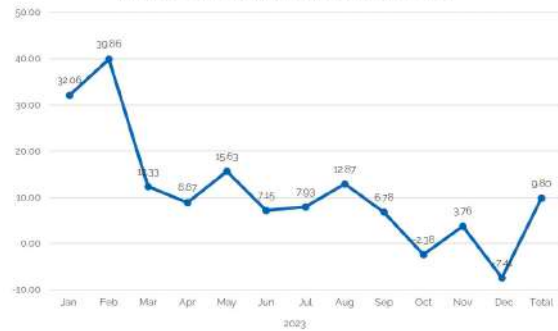
Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.19 Average Hotel Occupancy Rate in the City of Merida

Unit of measure: Percentage points

MONTH	2022	2023	DIF.
January	42.7	56.4	13.7
February	44.2	61.9	17.6
March	53.0	59.5	6.5
April	54.7	59.6	4.9
May	46.5	53.7	7.3
June	51.0	54.6	3.6
July	57.0	61.6	4.5
August	53.9	60.8	6.9
September	48.1	51.4	3.3
October	60.4	58.9	-1.4
November	65.3	67.8	2.5
December	60.6	56.1	-4.5
TOTAL	53.3	58.5	5.2

1.20 Percentage Variation of Average Hotel Occupancy in the City of Merida 2023 vs. 2022 (%)



Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.21 Average Hotel Occupancy Rate in Yucatan

Unit of measure: Percentage points

MONTH	2022	2023	DIF.
January	45.4	55.3	9.9
February	46.4	60.4	14.0
March	52.4	57.8	5.4
April	54.1	57.6	3.5
May	45.4	51.3	5.9
June	48.7	51.6	2.9
July	55.7	59.2	3.5
August	53.1	58.8	5.7
September	46.3	48.6	2.3
October	57.1	56.2	-0.9
November	63.2	65.0	1.8
December	59.4	55.1	-4.3
TOTAL	52.4	56.4	4.0

1.22 Percentage Variation of Average Hotel Occupancy in Yucatan 2023 vs 2022 (%)



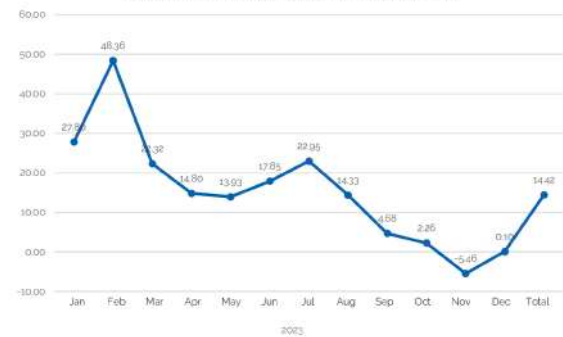
Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.23 Tourists Staying Overnight in Hotel Rooms in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	245,731	314,052	68,321
February	212,298	314,961	102,663
March	271,195	331,721	60,526
April	290,225	333,178	42,953
May	245,763	280,004	34,241
June	248,612	292,997	44,385
July	305,639	375,780	70,141
August	315,586	360,816	45,230
September	249,367	261,029	11,662
October	306,751	313,679	6,928
November	331,812	363,256	31,444
December	362,888	332,753	-30,135
TOTAL	3,385,867	3,874,226	488,359

1.24 Percentage Variation of the Tourists Staying Overnight in Hotel Rooms in Yucatan 2023 vs 2022



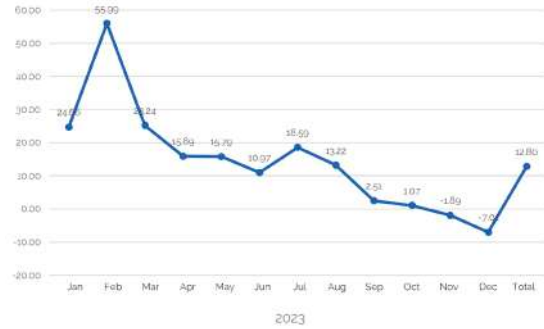
Source: DataTur Hotel Monitoring Program, Federal Ministry of Tourism, Government of Mexico.

1.25 Domestic Tourists Staying Overnight in Hotel Rooms in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	198,662	247,658	48,996
February	165,682	258,444	92,762
March	219,864	275,367	55,503
April	242,693	281,255	38,562
May	206,018	238,549	32,531
June	213,876	237,345	23,469
July	259,545	307,788	48,243
August	268,444	303,934	35,490
September	214,949	220,345	5,396
October	255,409	258,131	2,722
November	263,111	282,418	19,307
December	362,888	260,540	-102,348
TOTAL	2,871,141	3,171,774	300,633

1.26 Percentage Variation of the Domestic Tourists Staying Overnight in Hotel Rooms in Yucatan 2023 vs 2022



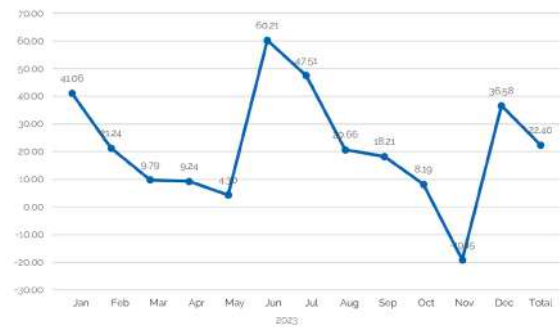
Source: DataTur Hotel Monitoring Program. Federal Ministry of Tourism. Government of Mexico.

1.27 International Tourists Staying Overnight in Hotel Rooms in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	47,069	66,394	19,325
February	46,616	56,517	9,901
March	51,331	56,354	5,023
April	47,532	51,923	4,391
May	39,745	41,455	1,710
June	34,736	55,652	20,916
July	46,094	67,992	21,898
August	47,142	56,882	9,740
September	34,418	40,684	6,266
October	51,342	55,548	4,206
November	68,701	80,838	12,137
December	59,188	72,213	13,025
TOTAL	573,914	702,452	128,538

1.28 Percentage Variation of the International Tourists Staying Overnight in Hotel Rooms in Yucatan 2023 vs 2022



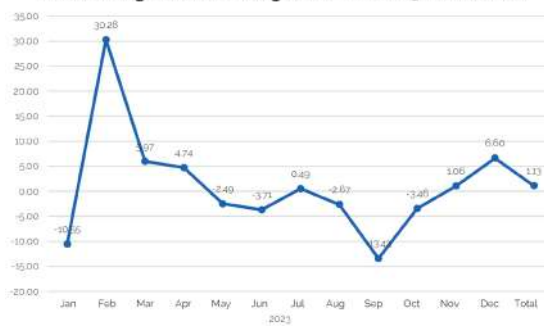
Source: DataTur Hotel Monitoring Program. Federal Ministry of Tourism. Government of Mexico.

1.29 Total Number of Excursionists to Yucatan's Archaeological and Ecological Sites

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	267,740	239,485	-28,255
February	207,818	270,749	62,931
March	244,322	258,915	14,593
April	259,329	271,617	12,288
May	211,423	206,160	-5,263
June	209,289	201,521	-7,768
July	291,650	293,091	1,441
August	292,800	284,978	-7,822
September	184,836	160,009	-24,827
October	215,435	207,985	-7,450
November	261,271	264,051	2,780
December	314,899	335,681	20,782
TOTAL	2,960,812	2,994,242	33,430

1.30 Percentage Variation of Excursionists to Yucatan's Archaeological and Ecological Zones 2023 vs. 2022 (%)



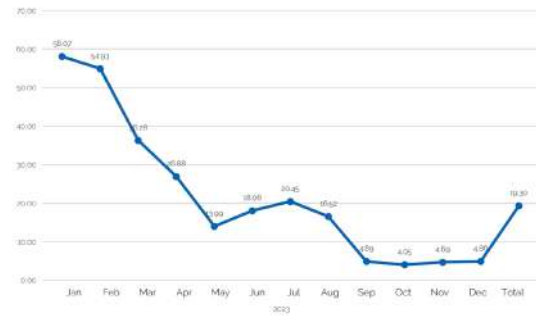
Source: Board of Cultural and Touristic Services Units of the State of Yucatan (CULTUR).

1.31 Total Air Passenger Movement in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.	
January	192,453	304,205	111,752	▲
February	181,369	280,991	99,622	▲
March	232,513	316,865	84,352	▲
April	242,331	307,476	65,145	▲
May	255,050	290,724	35,674	▲
June	238,507	281,577	43,070	▲
July	262,777	316,514	53,737	▲
August	277,852	323,752	45,900	▲
September	255,260	267,733	12,473	▲
October	303,541	315,825	12,284	▲
November	310,372	324,927	14,555	▲
December	327,593	343,514	15,921	▲
TOTAL	3,079,618	3,674,103	594,485	▲

1.32 Percentage Variation of the Total Air Passenger Movement in Yucatan 2023 vs 2022



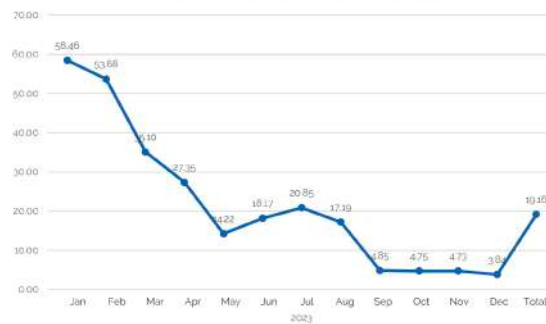
Source: Southeast Airport Group (ASUR).

1.33 Total Domestic Air Passenger Movement in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.	
January	173,128	274,343	101,215	▲
February	163,266	250,908	87,642	▲
March	210,273	284,069	73,796	▲
April	219,738	279,838	60,100	▲
May	233,721	266,946	33,225	▲
June	217,176	256,635	39,459	▲
July	238,365	288,074	49,709	▲
August	254,273	297,974	43,701	▲
September	235,413	246,828	11,415	▲
October	279,649	292,940	13,291	▲
November	284,758	298,217	13,459	▲
December	301,884	313,486	11,602	▲
TOTAL	2,811,644	3,350,258	538,614	▲

1.34 Percentage Variation of the Total Domestic Air Passenger Movement in Yucatan 2023 vs 2022



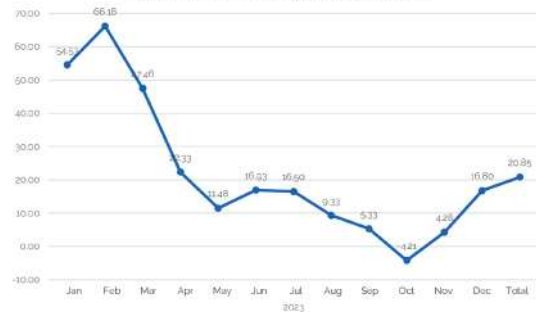
Source: Southeast Airport Group (ASUR).

1.35 Total International Air Passenger Movement in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.	
January	19,325	29,862	10,537	▲
February	18,103	30,083	11,980	▲
March	22,240	32,796	10,556	▲
April	22,593	27,638	5,045	▲
May	21,329	23,778	2,449	▲
June	21,331	24,942	3,611	▲
July	24,412	28,440	4,028	▲
August	23,579	25,778	2,199	▲
September	19,847	20,905	1,058	▲
October	23,892	22,885	-1,007	▼
November	25,614	26,710	1,096	▲
December	25,709	30,028	4,319	▲
TOTAL	267,974	323,845	55,871	▲

1.36 Percentage Variation of the Total International Air Passenger Movement in Yucatan 2023 vs 2022



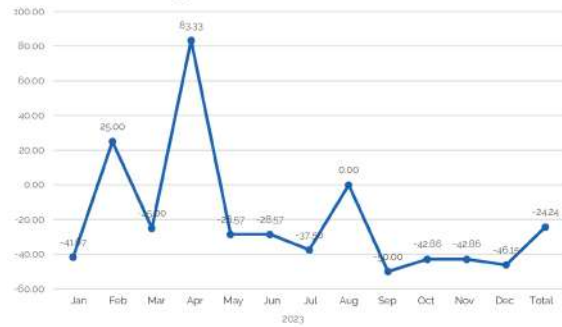
Source: Southeast Airport Group (ASUR).

1.37 Cruise Ship Arrivals at Puerto Progreso, Yucatan

Unit of measure: Ships

MONTH	2022	2023	DIF.
January	12	7	-5
February	8	10	2
March	8	6	-2
April	6	11	5
May	7	5	-2
June	7	5	-2
July	8	5	3
August	6	6	0
September	10	5	-5
October	7	4	-3
November	7	4	-3
December	13	7	-6
TOTAL	99	75	-24

1.38 Percentage Variation of Cruise Ship Arrivals to the Port of Progreso, Yucatan 2023 vs. 2022 (%)



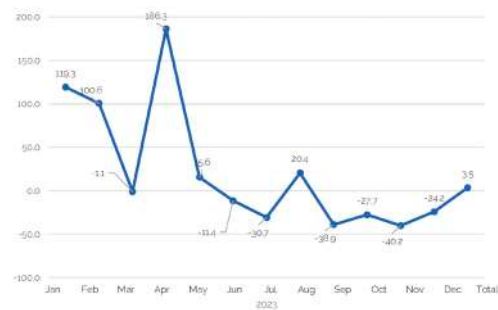
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

1.39. Movement of Cruise Passengers in Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.
January	10,656	23,367	12,711
February	13,694	27,468	13,774
March	19,031	18,826	-205
April	12,296	35,203	22,907
May	16,998	19,656	2,658
June	23,142	20,500	-2,642
July	28,033	19,420	-8,613
August	18,783	22,620	3,837
September	30,187	18,434	-11,753
October	20,885	15,107	-5,778
November	25,000	14,946	-10,054
December	33,519	25,421	-8,098
TOTAL	252,224	260,968	8,744

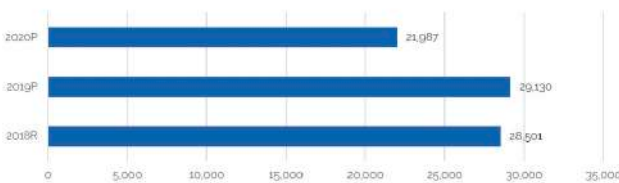
1.40 Percentage Variation of the Movement of Cruise Passengers in Yucatan



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

1.41 Gross Domestic Product of Tourism in Yucatan

Unit of measure: Millions of Mexican pesos



Source: Federal Ministry of Tourism, Government of Mexico with information from the National Institute of Statistics and Geography.

1.42 Tourism Activity's Contribution to the Gross Domestic Product of Yucatán (%)

Unit of measure: Percentage

YEAR	PARTICIPATION
2018 ^R	10.9
2019 ^P	11.1
2020 ^P	9.0

Constant 2013 prices "R", Revised figures "P", Preliminary figures

Source: Federal Ministry of Tourism, Government of Mexico with information from the National Institute of Statistics and Geography.

2.1 Number of Jobs in Restaurants and Hotels in the State of Yucatan

Unit of measure: Persons

PERIODICITY	2021	2022	2023	DIF
I Quarter	89,292	123,037	114,718	-8,319
II Quarter	100,553	123,729	115,986	-7,743
III Quarter	107,301	117,563	112,868	-4,695
IV Quarter	111,027	122,357	121,741	-616

2.2 Percentage Variation of the Number of Jobs in Restaurants and Hotels in the State of Yucatan 2023 vs 2022 (%)



Source: Federal Ministry of Tourism, Government of Mexico with information from the National Institute of Statistics and Geography.

3.1 Offer of available Lodging Rooms in Yucatan

Unit of measure: Rooms

MONTH	2022	2023	DIF.
January	15,474	15,906	432
February	15,556	15,906	350
March	15,556	15,915	359
April	15,568	16,004	436
May	15,618	16,119	501
June	15,626	16,153	527
July	15,683	16,153	470
August	15,726	16,368	642
September	15,726	16,402	676
October	15,735	16,431	696
November	15,739	16,473	734
December	15,756	16,483	727
TOTAL	15,756	16,483	727

3.2 Percentage Variation of the Offer of Available Lodging Rooms in Yucatan 2023 vs 2022



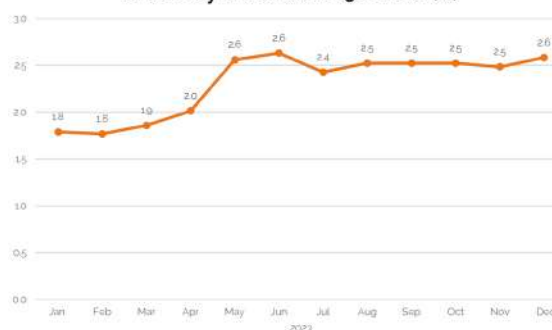
Source: Tourism Directory InvenTur, Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.3 Available Lodging Services in the City of Mérida

Unit of measure: Rooms

MONTH	2022	2023	DIF.
January	10,062	10,242	180
February	10,064	10,242	178
March	10,064	10,251	187
April	10,080	10,283	203
May	10,043	10,300	257
June	10,036	10,300	264
July	10,056	10,300	244
August	10,102	10,357	255
September	10,102	10,357	255
October	10,102	10,357	255
November	10,106	10,357	251
December	10,106	10,367	261
TOTAL	10,106	10,367	261

3.4 Percentage Variation of the Available Lodging Services in the City of Mérida 2023 vs 2022 (%)



Source: Tourism Directory InvenTur, Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.5 Total Tourist Service Establishments Registered in Yucatan

Unit of measure: Establishments

MONTH	2022	2023	DIF.
January	3,146	3,448	302
February	3,174	3,457	283
March	3,175	3,348	173
April	3,195	3,485	290
May	3,229	3,523	294
June	3,244	3,548	304
July	3,262	3,572	310
August	3,269	3,621	352
September	3,303	3,645	342
October	3,315	3,673	358
November	3,329	3,688	359
December	3,332	3,691	359
TOTAL	3,332	3,691	359

3.6 Percentage Variation of Total Registered Tourism Service Establishments in Yucatan 2023 vs 2022 (%)



Source: Tourism Directory InvenTur Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.7 Hotel Revenue in Yucatan

Unit of measure: Mexican pesos

MONTH	2022	2023	DIF.
January	206,612,250	271,422,393	64,810,143
February	198,840,544	277,366,569	78,526,025
March	234,723,765	311,675,821	76,952,056
April	222,013,386	278,611,411	56,598,025
May	198,490,104	249,304,087	50,813,983
June	219,448,383	232,155,894	12,707,511
July	249,404,187	292,274,801	42,870,614
August	227,606,682	271,924,575	44,317,893
September	214,963,811	215,427,606	463,795
October	270,130,685	278,268,765	8,138,080
November	274,155,042	306,196,072	32,041,030
December	295,011,912	307,269,415	12,257,503
TOTAL	2,811,400,751	3,291,897,409	480,496,658

3.8 Percentage Variation of Hotel Revenue in Yucatan 2023 vs 2022 (%)



Source: Tax Administration Agency of the State of Yucatan (AAFY).

3.9 Hotel Tax Collection in Yucatan

Unit of measure: Mexican pesos

MONTH	2022	2023	DIF.
January	10,331,060	13,587,848	3,256,788
February	9,922,831	14,002,882	4,080,051
March	11,728,077	15,588,680	3,860,603
April	11,134,642	13,925,231	2,790,589
May	9,945,803	12,505,186	2,559,383
June	11,198,033	11,614,864	416,831
July	12,483,656	14,680,773	2,197,117
August	11,366,309	13,598,870	2,232,561
September	10,762,391	10,779,579	17,188
October	13,488,145	13,991,546	503,401
November	13,726,595	15,324,632	1,598,037
December	14,752,778	15,308,924	556,146
TOTAL	14,752,778	15,308,924	556,146

3.10 Percentage Change in Hotel Tax Collection in Yucatan 2023 vs. 2022 (%)



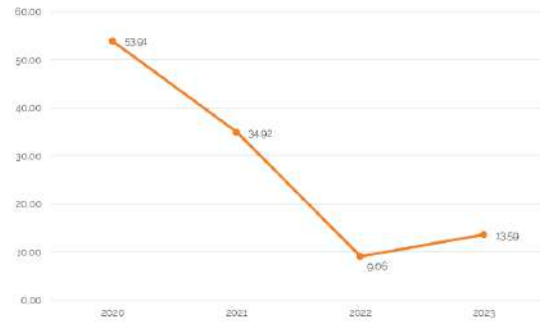
Source: Tax Administration Agency of the State of Yucatan (AAFY).

3.11 Accumulated Amount of Private Investment in Tourism Registered in Yucatan

Unit of measure: Mexican pesos

YEAR	AMOUNT	DIF.
2019	12,784,870.000	
2020	19,677,670.000	6,892,800.000 ▲
2021	26,548,677.935	6,871,007.935 ▲
2022	28,953,677.935	2,405,000.000 ▲
2023	32,887,727.935	3,934,050.000 ▲

3.12 Percentage Variation in the Accumulated Amount of Private Tourism Investment Registered in Yucatan



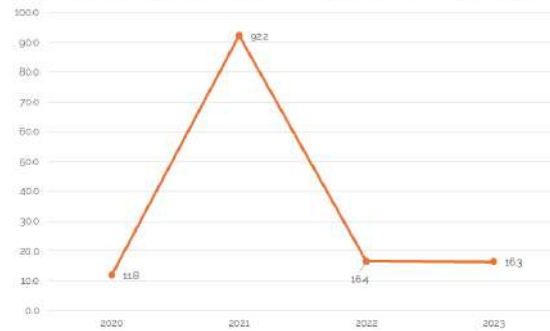
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.13 Total Direct and Indirect Jobs Generated by Private Tourism Investment Registered in Yucatan

Unit of measure: Jobs

PERIOD	DIRECT EMPLOYMENT	INDIRECT EMPLOYMENT	TOTAL JOBS	DIF.
2019	4,162	10,583	14,745	
2020	4,948	11,544	16,492	1,747
2021	9,573	22,130	31,703	15,211
2022	11,343	25,565	36,908	5,205
2023	13,145	29,783	42,928	6,020

3.14 Percentage Variation of Total Direct and Indirect Jobs Generated by Private Tourism Investment in Yucatan (%)



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.15 Cumulative Number of New Tourism Products Registered in Yucatan

Unit of measure: Products

YEAR	NEW PRODUCTS	DIF.
2020	60	
2021	143	83 ▲
2022	192	49 ▲
2023	215	23 ▲

3.16 Percentage Change in the Cumulative Number of New Tourism Products Registered in Yucatan (%)



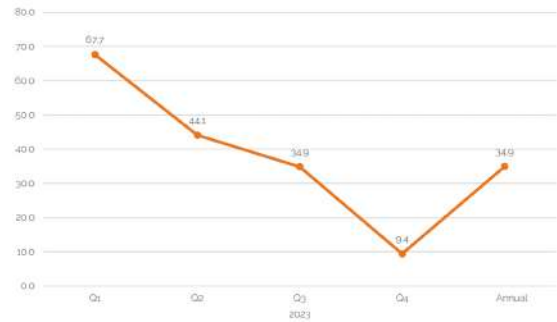
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.17 Economic Revenue of Overnight Visitors in Yucatan

Unit of measure: Millions of Mexican pesos

PERIOD	2022	2023	DIF.	
I Quarter	1,846.5	3,095.7	1,249.2	▲
II Quarter	2,118.8	3,053.0	934.3	▲▲
III Quarter	2,451.2	3,305.8	854.6	▲▲
IV Quarter	3,120.6	3,415.0	294.4	▲
ANNUAL	9,537.1	12,869.6	3,332.5	▲

3.18 Percentage Change in Economic Revenue from Overnight Visitors to Yucatan 2023 vs 2022 (%)



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

3.19 Average Daily Visitor Expenditure in Yucatan

Unit of measure: Mexican pesos

PERIOD	2022	2023	DIF.	
I Quarter	2,532	3,222	690	▲
II Quarter	2,700	3,369	669	▲▲
III Quarter	2,815	3,314	498	▲▲
IV Quarter	3,116	3,382	266	▲
TOTAL	2,817	3,322	504	▲

3.20 Percentage Change in Average Daily Visitor Expenditure in Yucatan 2023 vs. 2022 (%)



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

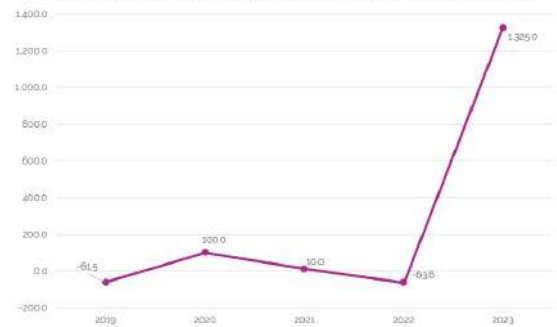
4.1 Companies Certified in Ecotourism and/or Sustainable Practices in Yucatan

Unit of measure: Companies

YEAR	COMPANIES	DIF.	
2018	13		▲
2019	5	-8	▲
2020	10	5	▲
2021	11	1	▲
2022	4	-7	▼
2023	57	53	▲

Note: Includes companies certified in Distintivo S, Punto Limpio and Distintivo Yucatan.

4.2 Percentage Variation of Companies Certified in Ecotourism and/or Sustainable Practices in Yucatan (%)



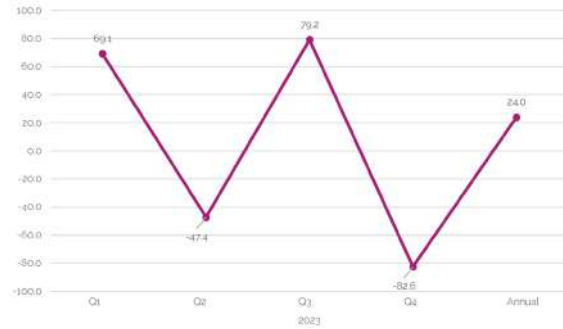
Source: Secretariat of Tourism Development of Yucatan (SEFOTUR).

4.3 Tourism Quality Certificates Awarded in Yucatan

Unit of measure: Certificates

PERIOD	2022	2023	DIF.	
I Quarter	55	93	38	▲
II Quarter	19	10	-9	▼
III Quarter	24	43	19	▲
IV Quarter	23	4	-19	▼
TOTAL	121	150	29	▲

4.4 Percentage Variation of the Tourism Quality Certificates Awarded in Yucatan 2023 vs 2022 (%)



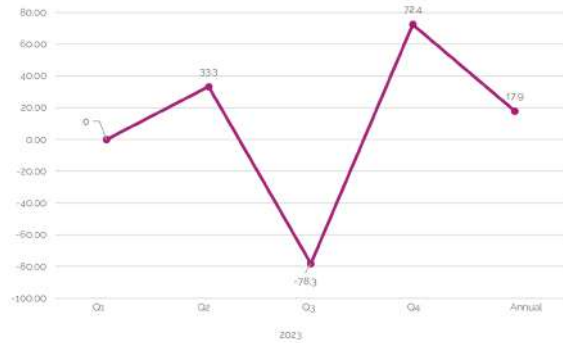
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

4.5 Number of Tourism Training Courses Offered in Yucatan

Unit of measure: Courses

PERIOD	2022	2023	DIF.	
I Quarter	0	4	4	▲
II Quarter	15	20	5	▲
III Quarter	23	5	-18	▼
IV Quarter	29	50	21	▲
TOTAL	67	79	10	▲

4.6 Percentage Variation of the Number of Tourism Training Courses offered in Yucatan 2023 vs 2022 (%)



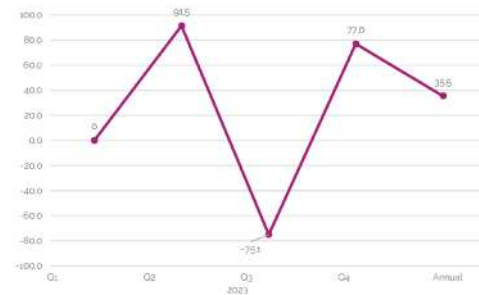
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

4.7 Tourism Service Providers Accredited in Training Courses offered in Yucatan

Unit of measure: Persons

PERIOD	2022	2023	DIF.	
I Quarter	0	106	106	▲
II Quarter	270	517	247	▲
III Quarter	437	109	328	▼
IV Quarter	544	936	419	▲
TOTAL	1,251	1,695	444	▲

4.8 Percentage Variation of the Tourism Service Providers Accredited in Training Courses offered in Yucatan 2023 vs 2022 (%)



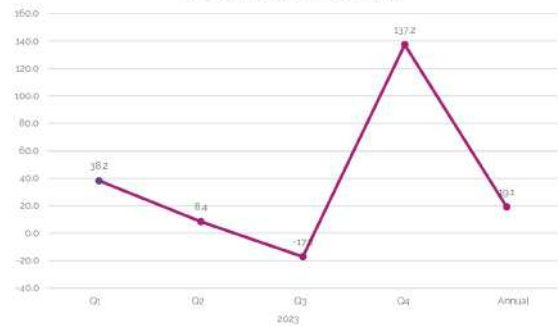
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

4.9 Percentage Variation of the Tourism Service Providers Accredited in Training Courses offered in Yucatan 2023 vs 2022 (%)

Unit of measure: Persons

PERIOD	2022	2023	DIF.	
I Quarter	12,336	17,050	4,714	▲
II Quarter	15,743	17,060	1,317	▲
III Quarter	20,325	16,826	-3,499	▼
IV Quarter	5,676	13,466	7,790	▲
TOTAL	54,080	64,402	10,322	▲

4.10 Percentage Variation of the Total Services Provided at the Tourist Information Modules of the Government of the State of Yucatan 2023 vs 2022 (%)



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

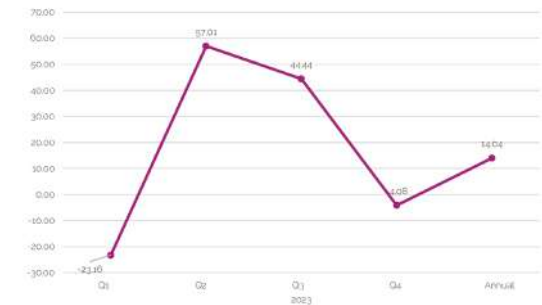
4.11 Total Number of Tourism Services Procedures in the State of Yucatan that were processed with the Federal Government

Unit of measure: Procedures

PERIOD	2022	2023	DIF.	
I Quarter	177	136	-41	▼
II Quarter	107	168	61	▲
III Quarter	153	221	68	▲
IV Quarter	147	141	-6	▼
TOTAL	584	666	82	▲

Note: Includes procedures for tourist guides (accreditations, renewals, recertifying and replacements), as well as procedures before the National Tourism Registry (RNT).

4.12 Percentage Variation of the Total Number of Tourism Services Procedures in the State of Yucatan that were processed with the Federal Government 2023 vs 2022 (%)



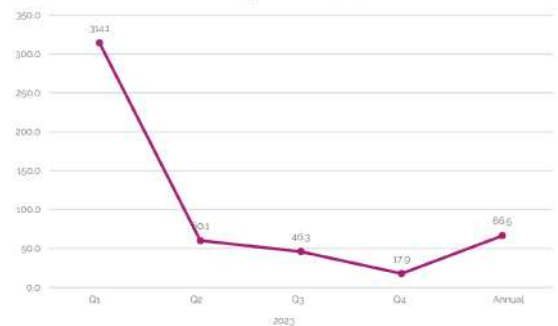
Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR) with information from Federal Ministry of Tourism, Government of Mexico.

4.13 Verifications Carried Out to Tourism Service Providers in Yucatan

Unit of measure: Verifications

PERIOD	2022	2023	DIF.	
I Quarter	425	1,760	1,335	▲
II Quarter	936	1,499	563	▲
III Quarter	1,385	2,026	641	▲
IV Quarter	1,467	1,729	262	▲
TOTAL	4,213	7,014	2,801	▲

4.14 Percentage Variation in the Number of Verifications Carried Out to Tourism Service Providers in Yucatan 2023 vs. 2022 (%)



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

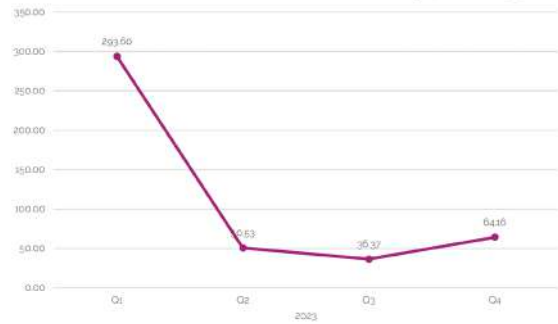
4.15 Percentage of Tourism Service Providers Verified in Yucatan

Unit of measure: Percentage

PERIOD	2022	2023	DIF.	
I Quarter	4.4	17.2	12.8	▲
II Quarter	9.4	14.2	4.8	▲
III Quarter	13.7	18.7	5.0	▲
IV Quarter	14.3	23.5	9.2	▲
TOTAL	10.5	18.4	7.9	▲

Note: Includes verifications of tourist guides, management of procedures before the National Tourism Registry (RNT) and tourist assistance.

4.16 Percentage Change in the Percentage of Tourism Service Providers Verified in Yucatan 2023 vs. 2022 (%)



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

4.17 Ecotourism Cooperatives Registered in Yucatan

Unit of measure: Companies

YEAR	COMPANIES	DIF.	
2018	65		
2019	65	0	▲
2020	72	7	▲
2021	111	39	▲
2022	187	76	▲
2023	194	7	▲

Source: Tourism Directory InvenTur; Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

4.18 State Tourism Advisory Council (CCET) Sessions Held in the State of Yucatan

Unit of measure: Minutes

PERIOD	2022	2023	DIF.	
I Quarter	1	1	0	
II Quarter	0	1	1	▲
III Quarter	0	0	0	
IV Quarter	2	1	1	▲
TOTAL	3	3	0	

Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).

4.19 Average Satisfaction Tourist Rating in Yucatan

Unit of measure: Points

YEAR	TOURIST QUALIFICATION	DIF.	
2018	7.65		
2019	8.02	0.37	▲
2020	8.82	0.80	▲

Source: Yucatan Tourism Observatory (YTO). Studies on the profile and degree of satisfaction of tourists in Yucatan.

4.20 Percentage of Tourists Returning to the State of Yucatan

Unit of measure: Percentage

YEAR	PERCENTAGE OF RETURN TO DESTINATION	DIF.	
2018	96.0		
2019	97.1	1.1	▲
2020	98.0	0.9	▲

Source: Yucatan Tourism Observatory (YTO). Studies on the profile and degree of satisfaction of tourists in Yucatan.

3.3.5 Local satisfaction

5.1 Average Satisfaction Rating with Tourism in their Locality in Yucatán

Unit of measure: Points

YEAR	MAGICAL TOWN	POINTS
2023	Izamal	9.4
	Valladolid	9.6
	Sisal	9.0
	Mani	9.8
	Total	9.5

Source: Yucatan Tourism Observatory (YTO).



1ST WORKSHOP ON SUSTAINABLE TOURISM INDICATORS

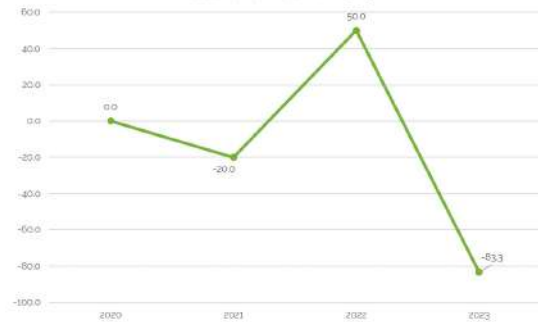
3.3.6 Energy management

6.1 Clean Industry Certificates issued for Yucatan

Unit of measure: Certificates

YEAR	CERTIFICATES	DIF.
2020	5	
2021	4	-1
2022	6	2
2023	1	-5
Total	16	

6.2 Percentage Change in Clean Industry Certificates Issued for Yucatan (%)



Source: Federal Attorney for Environmental Protection, Government of the State of Mexico.

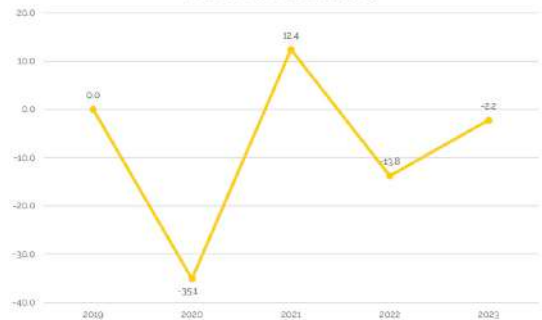
3.3.7. Water management

7.1 Kilograms of Waste Collected in Cenotes in Yucatan

Unit of measure: Kilograms

YEAR	KILOGRAMS	DIF.
2019	6,500	
2020	4,217	-2,283
2021	4,740	523
2022	4,088	-692
2023	3,997	-91
Total	17,042	

7.2 Percentage Variation of Kilograms of Waste Collected in Cenotes in Yucatan (%)



Source: Secretariat of Sustainable Development of the State of Yucatan.

3.3.7 Water management

7.3 Beneficiaries of Cleanup Actions in Cenotes in Yucatan

Unit of measure: Persons

YEAR	BENEFICIARIES
2019	997,388
2020	1,887,972
2021	60,093
2022	83,081
2023	141,548

Source: Secretariat of Sustainable Development of the State of Yucatan.



1ST WORKSHOP ON SUSTAINABLE TOURISM INDICATORS

3.3.8 Waste Water management

8.1 Yucatan's Ranking in Volume of Waste Water Treated per Thousand People in Mexico

Unit of measure: National position

PERIOD	Position in National Ranking
2019	31
2020	30
2021	31
2022	31
2023	30

Note. Ranking of 32 states of the republic, where 1 is the state with the highest volume of wastewater treated per thousand people and 32 is the state with the lowest volume of wastewater treated per thousand people.

Source: Technical Secretariat of Planning and Evaluation of the State of Yucatan with information from the National Water Commission.



1ST WORKSHOP ON SUSTAINABLE TOURISM INDICATORS

3.3.9 Solid waste management

9.1 Percentage of Households That Separate or Reuse their Solid Waste in Yucatan

Unit of measure: Percentage

YEAR	PERCENTAGE
2020	74.1

Source: Technical Secretariat of Planning and Evaluation of the State of Yucatan with information from the National Institute of Statistics and Geography.

9.2 Beach Cleanup Actions Implemented in Yucatan

Unit of measure: Action

YEAR	ACTIONS	DIF.	
2019	60		
2020	13	-47	▼
2021	30	17	▲
2022	48	18	▲
2023	49	1	▲
Total	140		

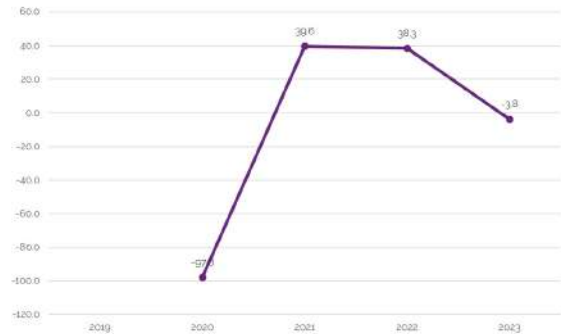
Secretariat of Sustainable Development of the State of Yucatan

9.3 Kilograms of Waste Collected on Yucatan Beaches

Unit of measure: Kilograms

YEAR	KILOGRAMS	DIF.
2019	598	
2020	13	-585
2021	18	5
2022	25	7
2023	24	-1
Total	677	

9.4 Percentage Variation in Kilograms of Waste Collected on Yucatan Beaches (%)



Source: Secretariat of Sustainable Development of the State of Yucatan.

9.5 Volunteers for Beach Cleanup Actions in Yucatan

Unit of measure: Persons

YEAR	PERSONS	DIF.
2019	10,048	
2020	2,666	-7,382
2021	3,911	1,245
2022	3,503	-408
2023	5,096	1,593
Total	15,176	

Source: Secretariat of Sustainable Development of the State of Yucatan.



1ST WORKSHOP ON SUSTAINABLE TOURISM INDICATORS

10.1 Percentage of Population Employed in Temporary Housing Services and Food and Beverage Preparation Services with Access to Health Institutions in Yucatan

Unit of measure: Percentage

YEAR	WORKING POPULATION	WITH ACCESS TO HEALTH INSTITUTIONS	(%) WITH ACCESS TO HEALTH INSTITUTIONS
2018	116,412	20,551	17.7
2019	109,490	20,327	18.6
2020	97,001	15,254	15.7
2021	11,027	23,008	20.7
2022	122,357	25,512	20.9
2023	121,741	22,096	18.2

Note: the period of the information presented corresponds to the fourth quarter of each year mentioned.

Source: National Institute of Statistics and Geography, National Survey of Occupation and Employment.

10.2 Percentage of Private Dwellings Inhabited that have Bicycles as a Means of Transportation in Yucatan

Unit of Measurement: Persons

YEAR	PERCENTAGE
2020	39.4

Source: Technical Secretariat of Planning and Evaluation of the State of Yucatan with information from the National Institute of Statistics and Geography.



IE-TRAM, PUBLIC ELECTRIC TRANSPORTATION SYSTEM

10.3 Urban Mobility Index in Yucatan

Unit of measure: Percentage

YEAR	PERCENTAGE
2020	48.84

Note: This index gives a score from zero to 100 for each city, both at the general level and for each sub-index, to know its performance.

Source: Technical Secretariat of Planning and Evaluation of the State of Yucatan with information from the Mexican Institute for Competitiveness.

10.4 Percentage of Satisfied Users of Public Transportation in Yucatan

Unit of measure: Percentage

YEAR	PERCENTAGE
2017	39.9
2019	43.0
2021	46.7

Source: Technical Secretariat of Planning and Evaluation of the State of Yucatan with information from the National Institute of Statistics and Geography.

11.1 Yucatan's Place in Sustainable Environmental Management in Mexico

Unit of measure: National position

YEAR	POSITION IN NATIONAL RANKING
2019	30
2020	30
2021	30
2022	30
2023	27

Note: Ranking of 32 Mexican states, where 1 is the state with the most sustainable environmental management and 32 is the state with the least sustainable environmental management.

Source: Technical Secretariat of Planning and Evaluation of the State of Yucatan with information from the Mexican Institute for Competitiveness.

11.2 Total Forest Fires in Yucatan

Unit of measure: Fires

YEAR	FOREST FIRES	DIF.	
2019	22		
2020	26	+4	▲
2021	15	-6	▼
2022	36	+21	▲
2023	15	-21	▼

Source: National Forestry Commission of the Government of the State of Mexico.

11.3. Total Area Affected by Forest Fires in Yucatan

Unit of measurement: Hectare (ha)

YEAR	AREA BURNED	DIF.	
2019	5,691		
2020	10,015	+4324	▲
2021	892	-9123	▼
2022	1,289	+397	▲
2023	765	-524	▼

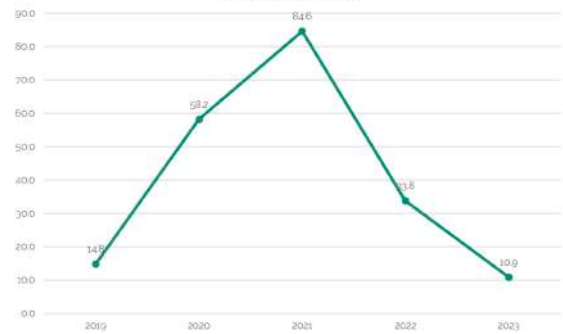
Source: National Forestry Commission of the Government of the State of Mexico.

11.4. Reforested Area with Trees in Yucatan

Unit of measure: Hectares

YEAR	HECTARES PLANTED WITH TREES	DIF.	
2018	181.6		
2019	208.5	26.9	▲
2020	329.8	121.3	▲▲
2021	608.6	278.9	▲▲▲
2022	814.2	205.6	▲▲
2023	903.1	88.8	▲

11.5. Percentage Variation of the Reforested Area with Trees in 2023 vs 2022 (%)



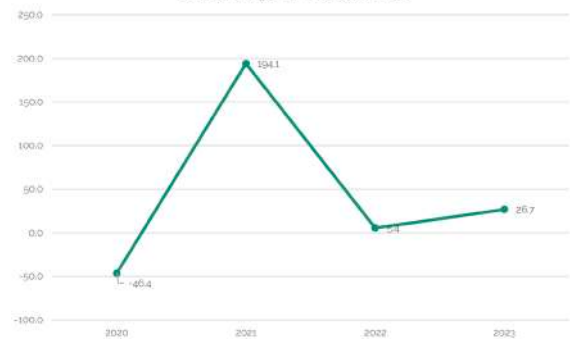
Source: Secretariat of Sustainable Development of the State of Yucatan.

11.6 Marine turtle hatchlings released in Yucatan

Unit of measure: Hatchlings

YEAR	OFFSPRING	DIF.	
2019	106,414		
2020	57,055	-49,359	▼
2021	167,780	110,725	▲▲
2022	176,868	9,088	▲
2023	224,062	47,194	▲

11.7 Percentage Variation of Released Marine Turtle Hatchlings in Yucatan (%)



Source: Secretariat of Sustainable Development of the State of Yucatan.

11.8 Movement of Visitors to Ecotourism Inns in the State of Yucatan

Unit of measure: Persons

MONTH	2022	2023	DIF.	
January	23,884	25,161	1,277	▲
February	20,730	20,878	148	▲
March	26,433	22,127	-4,306	▼
April	31,975	34,525	2,550	▲
May	21,387	16,858	-4,529	▼
June	17,386	14,580	-2,806	▼
July	22,656	19,957	-2,699	▼
August	16,001	22,471	6,470	▲
September	9,166	8,604	-562	▼
October	12,480	6,067	-6,413	▼
November	16,554	8,839	-7,715	▼
December	19,152	15,472	-3,680	▼
TOTAL	237,804	215,539	-22,265	▼

11.9 Percentage Variation in the Movement of Visitors to Ecotourism Inns in the State of Yucatan 2023 vs. 2022 (%)



Source: Board of Cultural and Touristic Services Units of the State of Yucatan (CULTUR).



CELESTUN BIOSPHERE RESERVE

Main Protected Natural Areas (ANP's) in Yucatan

Area	Type Administration	Surface Area (hectares)
1 Celestun Biosphere Reserve	Federal	81,482.33
2 Ria Lagartos Biosphere Reserve	Federal	60,347.82
3 Dzibilchantun National Park	Federal	539.43
4 Bala'an Kaax Flora and Fauna Protection Area (Surface Area in Yucatan)	Federal	15,733.00
5 Alacranes Reef National Park	Federal	333,768.50
6 Bajos del Norte National Park	Federal	1,304,114.00
7 Nuevo Uxmal National Park	Federal	1,884.28
8 Biocultural State Reserve of Puuc	State	135,848.85
9 Kabah State Park	State	949.76
10 Ich Kool Balamtun State Park	State	452.32
11 Protected Natural Area of Scenic, Historical, and Cultural Value San Juan Bautista Tabi and Annex Sanicte	State	1,355.74
12 Yalahau Lagoons State Park	State	5,683.28
13 Geohydrological State Reserve of the Ring of Cenotes	State	219,207.83
14 El Palmar State Reserve	State	47,931.45
15 State Reserve of Marshes and Mangroves of the Northern Coast of Yucatan	State	54,776.73
16 Dzilam State Reserve	State	69,309.29
17 Cuxtal Ecological Conservation Area	Municipal	11,894.56
18 Private Conservation Area in Zapotal	Private	4,088.55
Total Protected Area		2,349,367.72

Source: Secretariat of Sustainable Development of the State of Yucatan












3.4 Advances in the Dissemination of Indicators

The Yucatan Tourism Observatory (YTO) since its creation in 2018, has been dedicated to monitoring and disseminating a series of key indicators, through its online platform: <https://observatoryucatan.org.mx/indicadores>

As is well known, these indicators represent a vital source of information for interpreting the dynamics and behavior of tourism activity in the State of Yucatan, since they are an invaluable tool for planning and decision making in the sector.

Therefore, it is important to provide timely follow-up and updating of the indicators monitored by the YTO, to present the general situation of online dissemination of the information generated.

**Current Overview of the Dissemination of the Indicator System
of the Yucatan Tourism Observatory (YTO), According to the INSTO Thematic Areas**

Classification	Key areas of sustainability	Category	Indicators generated	Published indicators	% of diffusion on web site
	Tourist Seasonality	Economic	42	21	50%
	Employment	Social	2	1	50%
	Destination Economic Benefits	Economic	20	6	30%
	Governance	Governance	13	0	0%
		Social	7	0	0%
	Local Satisfaction	Social	1	0	0%
	Energy Management	Environment	2	0	0%
	Water Management	Environment	3	0	0%
	Waste Water Management (Sewage)	Environment	1	0	0%
	Solid Waste Management	Environment	5	0	0%
	Accessibility	Environment	4	0	0%
	Climate Action	Environment	9	0	0%
Total Indicators			109	28	26%



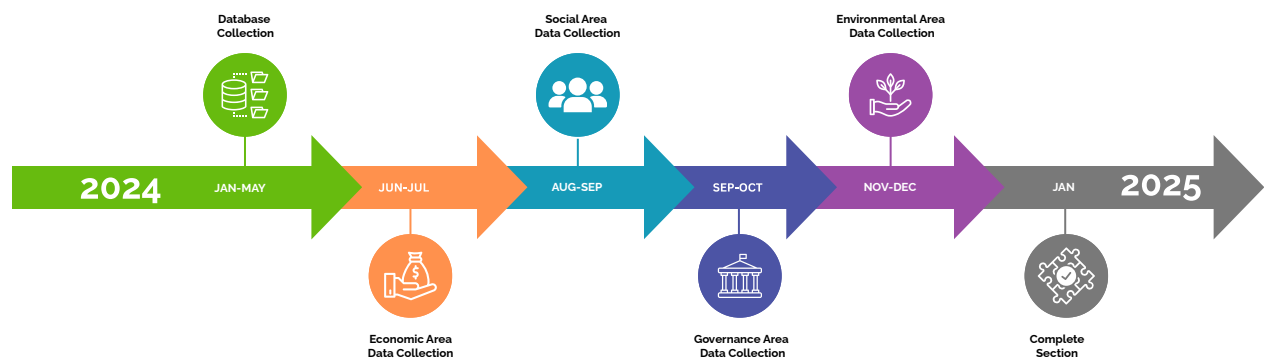
SAN FELIPE PORT

Currently the YTO tracks 109 indicators, integrated by variables and their variations of the tourism activity developed in Yucatan, of which only 26% are public in the indicators section of the web platform, while the rest of the indicators are maintained through a database registry.

The commitment during 2024 will be to achieve that 100% of the indicators monitored for the key areas of sustainability are available in the indicators section of the YTO web platform.

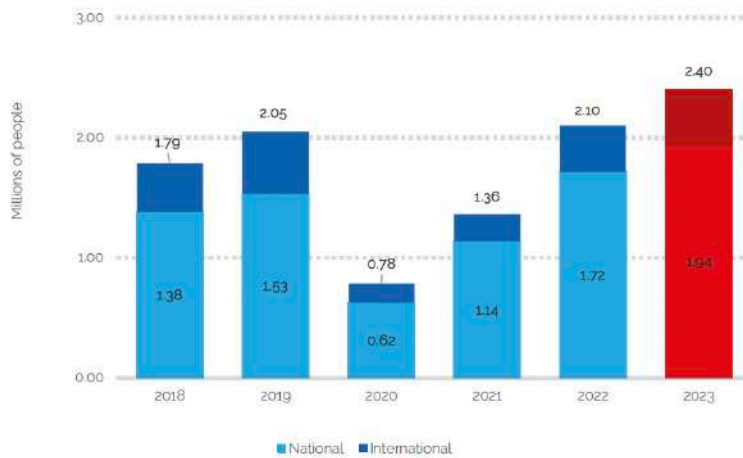
To this end, it is proposed to redesign the section into 4 main categories, as shown in the summary table above, namely economic, social, governance and environment.

In this way, the 2024 work scheme is presented below to advance in the dissemination of the results of the indicators currently measured in the YTO, through the existing web platform:



3.5 Results of the Main Indicators of Tourism Activity in Yucatan 2023

Graph 1. Tourist Arrivals with Overnight Stays in Lodging Establishments in the Main Tourist Centers in Yucatan



Source: DataTur Hotel Monitoring System. Ministry of Tourism of Mexico (SECTUR).



2.4 million

Overnight Visitors in Yucatán in 2023



1,936,971

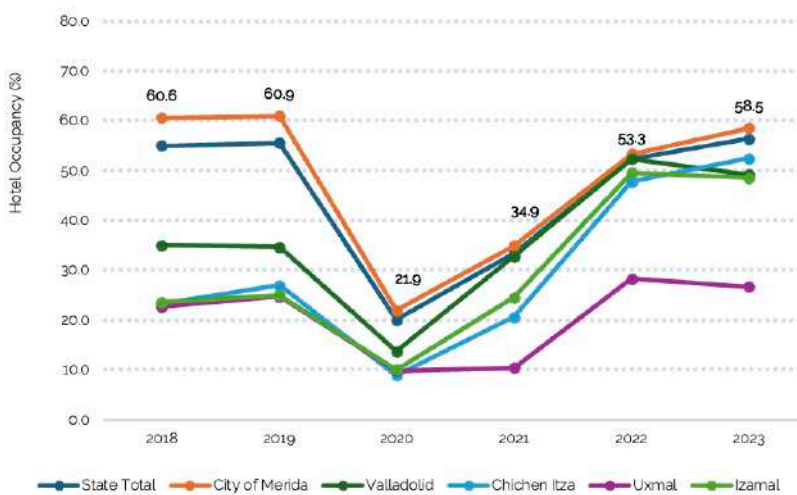
Domestic visitors in 2023



459,896

International visitors in 2023

Graph 2. Hotel Occupancy Rate in the Main Tourist Centers of Yucatan



Source: DataTur Hotel Monitoring System. Ministry of Tourism of Mexico (SECTUR).



58.5%

Hotel Occupancy Rate in the City of Merida in 2023

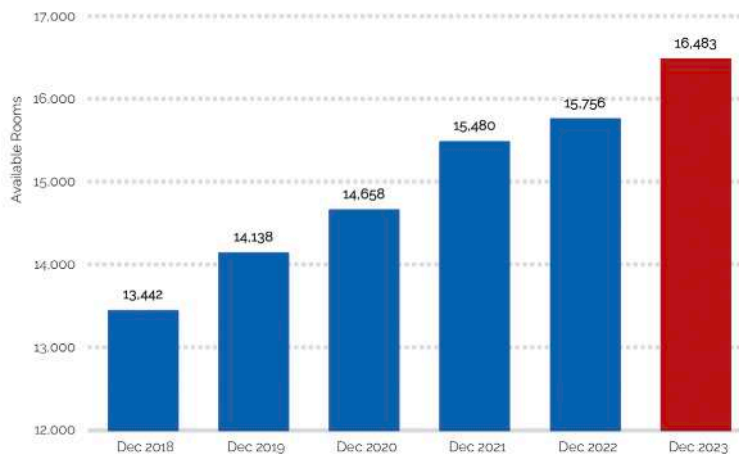


56.4%

Hotel Occupancy Rate in the State of Yucatan in 2023



Graph 3. Supply of Rooms in Yucatan



Source: InvenTur Tourism Directory, Ministry of Tourism Development of the Government of the State of Yucatan (SEFOTUR).



16,483

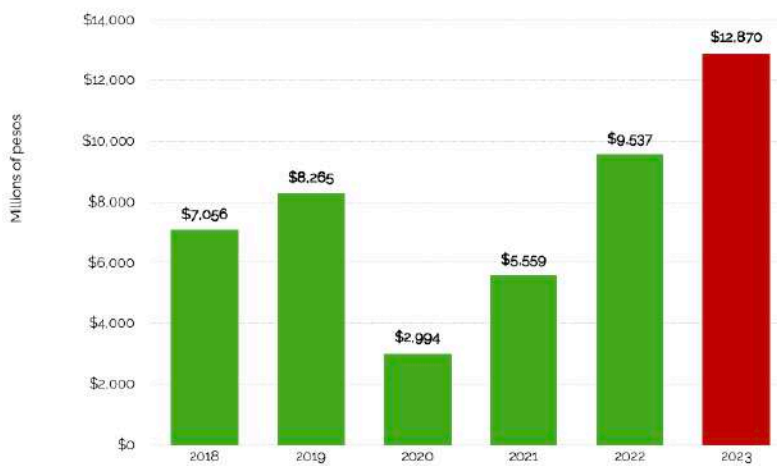
Supply of rooms in Yucatán in 2023



4.61%

Increase in 2023 compared to 2022

Graph 4. Tourism Economic Revenue in Yucatan



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).



\$12,870

Million of pesos
Economic revenue by tourism in Yucatan in 2023



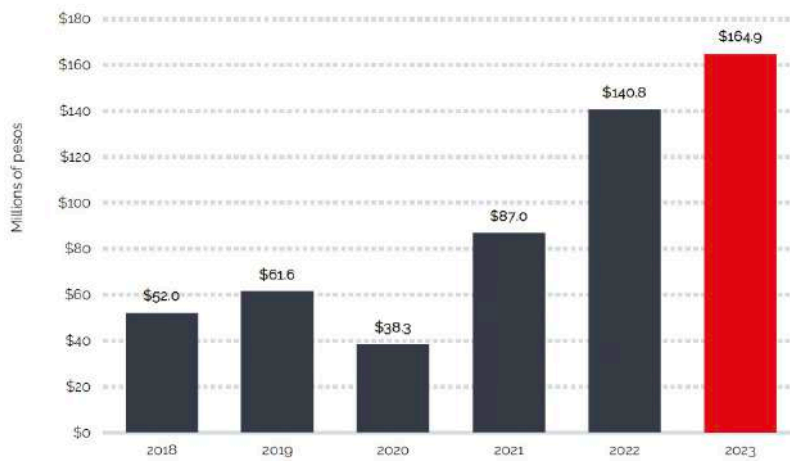
34.94%

Percent growth in 2023 compared to 2022



TYPICAL YUCATECAN CUISINE

Graph 5. Lodging Tax Collection in Yucatan



Source: Tax Administration Agency of the State of Yucatan (AAFY).

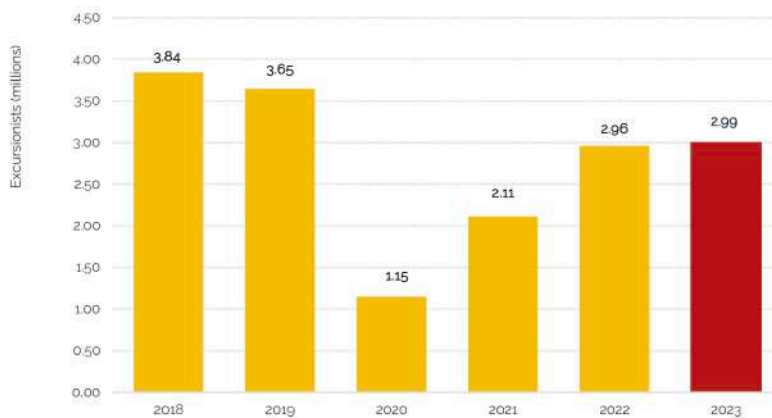


Million of pesos in lodging tax revenue in 2023



Increase in tax collection compared to 2023 vs 2022

Graph 6. Number of Excursionists to Tourist Inns in the Main Archaeological and Ecological Zones in Yucatan



Source: Board of Cultural and Touristic Services Units of the State of Yucatan (CULTUR).



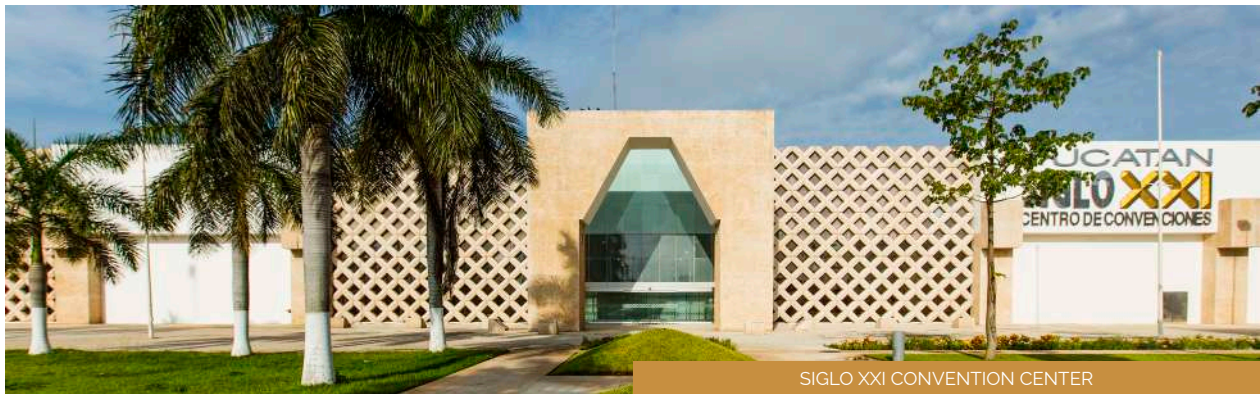
2.99 million

Visitor arrivals to touristic centers in 2023



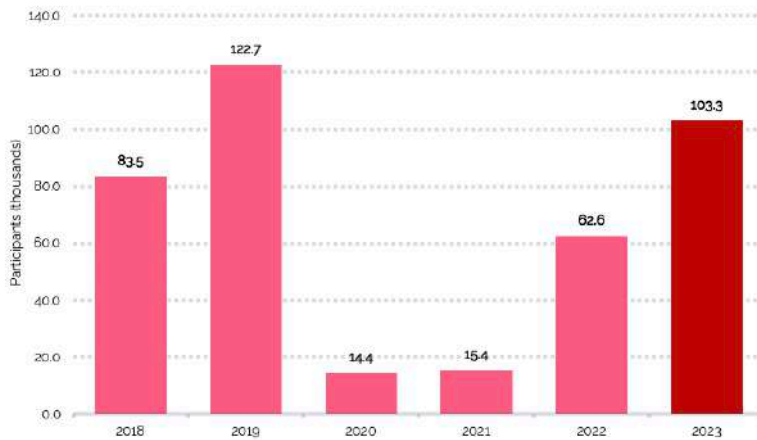
33,430

Excursionist in 2023
1% more than 2022



SIGLO XXI CONVENTION CENTER

Graph 7. Visitors for Mice Events in the City of Merida



Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).



103.3 thousand

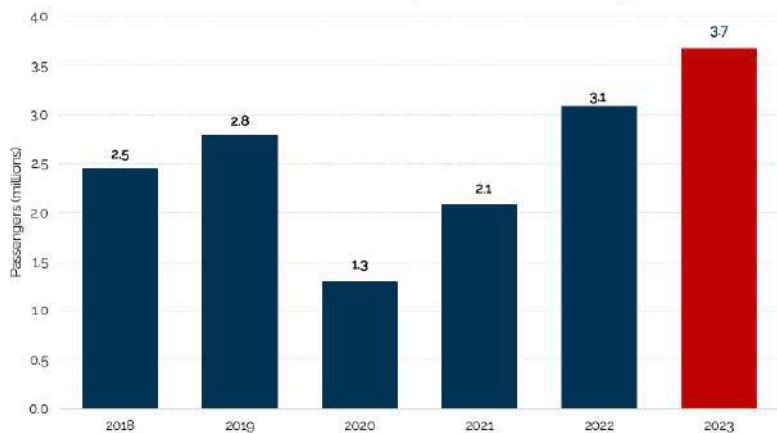
Visitors for Mice Events in the City of Merida in 2023



65%

Percent increase in 2023 compared to 2022

Graph 8. Movement of Air Passengers (Arrivals and Departures) at the International Airport of Merida City



Source: Group ASUR.



3.7 million

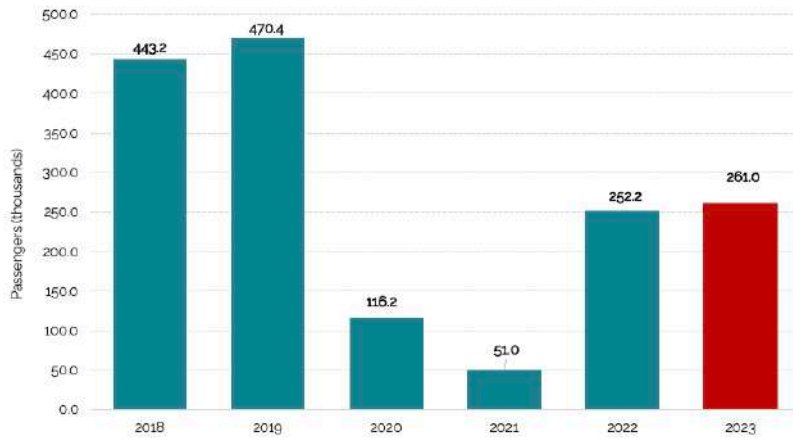
Passenger movements by air in 2023



594,485

19.4% increase from 2022 to 2023

Graph 9. Arrival of Cruise Passengers at the Port of Progreso



261 thousand

Cruise passengers arrived at Port of Progreso in 2023



8,744

More than 2022, a **3.5%** increase compared to 2022

Source: Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR).



CRUISE TERMINAL, PROGRESO DE CASTRO

3.6 Summary of the Results of the First Workshop for the Definition of Indicators of Sustainable Tourism in Yucatan

In adherence to the Norms for the Operation and Management of the International Network of Sustainable Tourism Observatories (INSTO) of UN Tourism, in its fractions vi and vii of its subsection "C", which establishes the need to hold a Stakeholder Workshop during the first year of acceptance as members of the network (YTO has been a member since January 2023), in order to: (a) discuss the findings of the preliminary study, (b) reflect and agree on the thematic areas and indicators that the observatory will monitor, (c) identify the most important needs, gaps and data sources, (d) clearly define the roles and responsibilities of stakeholders and the frequency of stakeholder meetings; the First Workshop for the Definition of Sustainable Tourism Indicators was held in October 2023, organized by the Yucatan Tourism Observatory and the Secretariat of Tourism Development of the Government of the State of Yucatan (SEFOTUR) in the facilities of the Faculty of Anthropological Sciences of the Autonomous University of Yucatan (UADY).

The event began with a welcome message from Dr. Dirk Glaesser, Director of Sustainable Tourism at UN Tourism and President of the INSTO Network, who mentioned the importance of the holistic measurement of sustainability. Subsequently, and as an introduction and sensitization to the topics and activities to be carried out in the workshop, Mr. Vicente Ferreyra Acosta, Founder of SustenTur, gave the keynote lecture "Challenges in the Development of Sustainable Tourism".

Sustainability Indicators", where he pointed out the relevance of identifying what and how tourism is



Dr. Dirk Glaesser
Director, Sustainable Tourism Development,
World Tourism Organization (UNWTO)



Lic. Raul Paz Noriega
Technical Secretary, Secretariat of Tourism
Development of the Government of the
State of Yucatan (SEFOTUR).

measured, which led to a reflection on the mandatory thematic areas that observatories must monitor.

The above-mentioned activities, held in the Salvador Rodríguez Losa Auditorium of the Faculty of Anthropological Sciences of the UADY, were attended by a total of 63 people, including some students from the tourism degree program at the host institution. Among the public organizations present at this meeting were the directors or representatives of the Southeast Regional Directorate of the National Institute of Geography and Statistics (INEGI); the Ministry of Economic Development and Labor of the State of Yucatan (SEFOET); the City Council of Merida; the City Council of Mani; the City Council of Espita; and the FIDE, the Secretariat of Tourism of the State of Yucatan. Municipality of Espita; and the Trust for the Development of Convention Tourism in Yucatan (FIDETURE), in addition to officials from other State Government agencies such as the Secretariat of Planning and Evaluation (SEPLAN), the Institute of Mobility and Urban Territorial Development (IMDUT), the Secretariat of Sustainable Development (SDS); the Institute for the Inclusion of People with Disabilities of Yucatan (IPEDEY) and representatives of federal agencies such as the Ministry of Environment and Natural Resources (SEMARNAT), the Federal Attorney's Office for Environmental Protection (PROFEPA) and the National Commission of Natural Protected Areas (CONANP).

Representatives from the private sector included representatives from the Mexican Association of Hotels of Yucatan (AMHY); the National Chamber of Commerce, Services and Tourism of Merida (CANACO-SERVYTUR); the Association of Hotels and Hostels of Valladolid; the Magical Town Committee of Valladolid; EcoGuerreros and Caminos del Mayab; among others.

The academic and social sector was represented by professors, researchers and members of organizations such as the Autonomous University of Yucatan (UADY), Marist University of Mérida, Anahuac Mayab University of Mérida, Metropolitan Technological University (UTM), UNAM's Academic Unit in Sisal, Haciendas del Mundo Maya Foundation, W/WF Costas y Mares Group, and Co'ox Mayab.



1ST WORKSHOP ON SUSTAINABLE TOURISM INDICATORS

The forum was inaugurated by Mr. Raul Paz Noriega, Technical Secretary of SEFOTUR; Dr. Rocio Cortes Campos, Director of the Faculty of Anthropological Sciences of UADY; Mr. Jorge Lerma Nava, Undersecretary of Sustainable Tourism Development of SEFOTUR and Dr. Ileana Lara Navarrete, Operational Coordinator of YTO.

Subsequently, the session of the Sustainable Tourism Indicators Workshop was held, developed in four work tables that integrate the 11 key areas of sustainability, grouped in the four areas of sustainability: Social, Environment, Economy and Governance, in which 36 representatives of the public, private, academic and social sectors linked to the tourism industry of the entity participated actively, who had an outstanding participation in the discussion and exchange of ideas carried out in each table.

Activities were carried out to cover items a, b, c and d mentioned in the first paragraph of this section and integrated information gathering instruments were used, such as a survey questionnaire about the benefits and interest of stakeholders regarding the Yucatan Tourism Observatory and SWOT analysis tables, which are explained below.

3.6.1. Benefit, interest and participation survey

In this exploration, the possibility of participation of these stakeholders in activities that could contribute to the organization of information collection, indicator development, monitoring and other substantive activities of the observatory was questioned. For the survey, a multiple-choice questionnaire type collection format was used, structured in 4 questions (two of them composed), which was answered by 36 representatives of the public, private, academic and social sectors, grouped in thematic working tables related to the economy, governance, environment and social aspects of the town. The results are as follows:

Question 1

What specific benefits could the Yucatan Tourism Observatory (YTO) provide?

Participants considered the following as benefits:

92% Obtaining integrated, reliable, timely and current information to support actions.

31% Dissemination and promotion of its specific products and services worldwide and locally.

53% Effective communication with the sector.

14% Other benefits such as: information on local and global needs and problems; new indicators for making medium and long-term decisions; information for research;

relevant training of future researchers and workers in the tourism sector; providing field data and information, source of research studies; decision making by municipal, state and federal authorities.

To the complementary question, How or with what actions can the YTO help you achieve your objectives, the following responses were received:

75% Provide relevant and adequate information.

72% Ensure that information is constantly updated.

31% Enable local and worldwide dissemination of products and services. 58% Facilitate clear and accessible consultation.

44% To offer robust and productive linkages in the sector.

36% Simplify the effective participation of stakeholders.

6% Other actions such as workshops, training courses and synergies within the sector.

Question 2

In order to obtain the benefits that YTO's mission provides, the participation and help of everyone is required. From the following list, in which support or activity could you participate?



Six support possibilities were identified, listed as follows:

1. Providing data, information, monitoring and/or development of indicators was chosen by 97% of the participants, who indicated which of the thematic areas they could support, as follows:

83% would contribute to INSTO priority issues: Local satisfaction with tourism 33%; Destination Economic Benefits 33%; Employment 33%; Seasonality of Tourism 19%; Energy Management 8%; Water Management 14%; Waste Water Management 17%; Solid Waste Management 17%; Governance 31%; Accessibility 14%; Climate Action 25%.

89% could support specific local issues such as: Creation of circuits and routes 39%, Control of tourist activities 28%; Management of major events 14%; Cruises 11%; Condition of beaches 25%; Effects on communities 33%; Sea water quality 11%; Conservation of built heritage 28%; Fragile ecosystems 28%; Access to local assets 14%; Air pollution 11%.

2. Sharing experience, was considered by 67% of the participants, who indicated that they could share experiences in topics such as: cultural events, training; methodological design; themes and planning of municipal programs and field work; designation of municipal programs, municipal tourism directorates; technical support in management and with data collected by SEFOTUR; biodiversity component (Programs, strategies); Research results; tourism focused on communities; land management; conservation and restoration of ecosystems; management and conservation of natural resources; through information collected since 2011 in the Peninsula; field work, promotion; indicators; fair trade value chains in tourism in rural communities; exchange of experiences with communities; inputs generated; universal design diagnostics; site visits, shared experiences; show the sector the waste management model in a small hotel; regulations and preventive and connective actions; good practices suitable for people with disabilities and labor inclusion; tourism and operation / good practices; workshops, talks.



BENITO JUAREZ PARK, TEKAX, MAGICAL TOWN



3. Sharing equipment or facilities was the support offered by 28% of the participants, who indicated that they could share the following: Municipal spaces (parks, cultural venues); auditorium; meeting room for 10 people; equipment and facilities; documents and data; audiovisual and specialized MKT-type rooms; collaborations for companies, data collection and analysis; workshops and computer equipment; personal equipment.

4. Funding was offered by 64% of the attendees for research, field work and promotion of a. Activities, b. Benefits, c. Information generated, and d. Information and communication. activities, b. Benefits, c. Information generated and d. Others such as: networking, courses focused on the local tourism sector (Merida), financing for their businesses, impact analysis, workshops, and through the Biodiversity Observatory of Yucatan (OBEY) currently under consolidation.

5. Political or social influence to facilitate obtaining information (22%), the participation of key stakeholders (44%) and the momentum of the YTO (39%). In total, this item was chosen by 81% of participants.

6. Frequency of availability to participate in working groups to identify needs, make decisions, organize activities according to their area and disposition, liaise with elements of the different stakeholders, 17% responded monthly; 40% preferred bimonthly participation; 37% opted for quarterly participation; 6% had no preference as to timeframe and (one person) did not indicate a timeframe for participation.

Question 3

What means or processes do you prefer for information exchange between your organization or institution and the YTO?

The participants indicated one, two, three or all four options as follows: the periodic newsletter was preferred 17% of

the time, face-to-face meetings 22%, virtual meetings 37% and 24% of the participants indicated the Web page as their preferred medium.

Of the following thematic areas, assign with numbers an order of priority that you consider most convenient for the tourism sector of the State of Yucatan. Number 1 will be the highest priority and will be followed in descending order as priority decreases.

Both the 11 priority issues of INSTO and the 11 specific to the town were listed.

Most of the participants chose to prioritize all of the themes predominantly, but some did not. The least chosen theme was Accessibility with 12 choices and the themes with the most entries were Employment and Destination Economic Benefits with 33 and 32 choices respectively. It is interesting to note that six of the themes appear with 30 choices equally, although with different level of prioritization indicating their importance for most of the participants, these themes are: Local Satisfaction with Tourism, Energy Management, Governance, Climate Action, Conservation of Built Heritage and Fragile Ecosystems.

Although all topics received registrations, the priority assigned to each was very varied and dispersed. The top five priorities assigned are as follows:

1. Two themes with six equal choices: Destination Economic Benefits and Fragile ecosystems.
2. Eight choices correspond to Local satisfaction with tourism.
3. Four themes with three equal choices: Local satisfaction with tourism, Destination Economic Benefits, Employment and Fragile ecosystems.



4. Six choices correspond to the theme of: Destination Economic Benefits.
5. Five elections correspond to the Employment theme.

Other topics suggested by the participants and which were prioritized in 1st and 2nd place are:

Stakeholder training, Local committees, Biodiversity, Urban and natural landscape conservation, Gentrification in historic towns, Adequate resource management, Land use planning.

2. SWOT Analysis

As in the previous instrument, the participants collaborated by thematic roundtable using SWOT analysis formats, in which, as is well known, the strengths and opportunities derived from these strengths are freely presented, as well as the weaknesses and threats that each member of the roundtable in question considers to exist at the present time with respect to tourism in the state. The participants were asked to prioritize the different items and present them in the order of importance they considered appropriate. The results of this analysis are as follows:

Social Roundtable. The participants of this roundtable identified the following as the state's most significant strengths: 1. Current valorization of culture, generating positive aspects both socially and economically; 2. Existing natural resources and their conservation status; 3. Security; 4. The presence of a living culture such as the Maya; 5. Connectivity with neighboring states like Cancun; 6. Economic development opportunities for Yucatecan communities; 7. Openness to new strategies and accessible tourism.

The identified weaknesses included: 1. Quality of service lacking professionalism and language proficiency; 2. Modification of urban activity due to disorderly gentrification; 3. Lack of community governance; 4. Communication disconnection among tourism stakeholders; 5. Poor management of water treatment and waste; 6. Uncontrolled pollution in municipalities; 7. Lack of internal connectivity within the state; 8. Insufficient distribution of tourism resources; 9. Scant or non-existent public policies addressing accessibility, sign language interpretation, and other disabilities.

Environment Roundtable. The participants of this roundtable identified the following major strengths of the state: 1. The existing biodiversity in the region; 2. The natural resources available (water, cenotes, and beaches); 3. The diversity of ecotourism activities and initiatives undertaken; 4. The promotion and development of tourism products.

The major weaknesses noted were: 1. Insufficient public policies addressing environmental issues; 2. The geographic or demographic context of the state impacting its reality; 3. The lack of indicators at the local/municipal level; 4. Limited monitoring of



environmental management and lack of stewardship; 5. Pollution; 6. Overexploitation of resources, privatization, and loss of flora and fauna resources.

Additional points of concern, though not prioritized, include: the absence of local-level indicators, which impedes establishing a baseline for progress and the lack of updated data; the satisfaction of residents has not been measured (this study was recently conducted); the carrying capacity of destinations has not been determined; privatization of some resources; community consultation is needed to determine their willingness to participate in projects; and a gender perspective is required in communities, as cooperatives are often dominated by men.

Economy Roundtable. The participants of this roundtable identified the following strengths: 1. Improved quality of life for Yucatan residents; 2. Tourism promotion; 3. Legal certainty; 4. Availability of tourism data and information; 5. Multidestination diversity; 6. An active and participatory sector; 7. Perception of security; 8. Cultural richness; 9. Natural beauty; 10. Conservation of built heritage.

The identified weaknesses were: 1. Disorderly and underdeveloped growth; 2. Exploitation and lack of opportunities for employees; 3. Insufficient dissemination and knowledge of tourism observatory indicators; 4. Limited connectivity; 5. Loss of cultural identity; 6. Lack of professionalism in destinations; 7. Data veracity issues among observatory stakeholders; 8. Limited tourism promotion; 9. Lack of employee loyalty; 10. Displacement of native residents.

Governance Roundtable. The participants of this roundtable identified the following strengths: 1. Training directed towards the sector rather than internal training; 2. Strength to halt activities that do not benefit the community, magical towns, or municipalities, preventing private sector encroachment; 3. Great openness in gastronomy, culture, and tourist attractions.

The identified weaknesses were: 1. Lack of data; 2. Insufficient training for municipal tourism authorities; 3. Misaligned training objectives; 4. Limited operational budget.

Final workshop considerations

The prioritized topics were approached with different points of view and opinions, which denote the disciplinary load of each table, however, it is remarkable the coincidence of the participants to see as strengths of the region, topics such as: its natural and cultural wealth, the existing security and legal certainty, the promotion and tourist development exercised, as well as the importance of the communities and their participation. With respect to weaknesses, themes such as the lack of training of the sector in general; the lack of knowledge, data and indicators at the local level; the disorderly growth and lack of development; the disorderly gentrification and the need to include and support the communities more, with greater governance and participation, appear more frequently. It is important to recognize the willingness of all attendees to participate.



INSTO

International Network
of Sustainable Tourism
Observatories



Observatorio
Turístico de
Yucatán

LOCAL SATISFACTION STUDY IN FOUR MAGICAL TOWNS OF YUCATAN 2023

Executive Summary



UADY
UNIVERSIDAD
AUTÓNOMA
DE YUCATÁN



Juntos transformemos
Yucatán
GOBIERNO DEL ESTADO

SEFOTUR
SECRETARÍA DE FOMENTO
TURÍSTICO



LOCAL SATISFACTION STUDY IN MAGICAL TOWNS OF VALLADOLID, IZAMAL, MANI, AND SISAL

3.7. Executive Summary of the Local Satisfaction Study in Four Magical Towns of Yucatan 2023

The study was conducted under the supervision of various academic and governmental authorities. Maria Isabel Bolio Rosado and Dr. Ileana Beatriz Lara Navarrete were co-responsible for the project and research, with significant contributions from Cecilia Paloma Lopez Solis in research and analysis, and other collaborators who provided support in various capacities, including graphic design and supervision of scholarship recipients. Michelle Fridman Hirsch, Secretariat of Tourism Development of the Government of the State of Yucatan, along with other members of the state government, also participated actively.

The main objective of the study was to know and analyze the perception and degree of satisfaction of the inhabitants of the Magical Towns of Valladolid, Izamal, Mani and Sisal with respect to tourism in their towns. We sought to determine both the positive and negative impacts of tourism activity and the importance that residents assign to this economic sector.

The study used a non-experimental and transactional group research design, where variables were observed in their natural context without direct manipulation. A representative sample of residents over 18 years of age was selected using statistical techniques, ensuring the representativeness of the sample through random selection. The main hypothesis suggested that the valuation of tourism by residents is directly related to the perceived benefits, especially economic.

The information was collected through surveys applied to 258 residents of the towns selected. Various aspects were analyzed, such as perception of the effects of tourism, dependence on tourism for quality of life, and general satisfaction with tourism activity.

The results indicated a highly positive perception of tourism in the communities. Most residents positively valued the benefits of tourism, such as employment generation and stimulation of local culture. However, negative effects such as increased prices were also perceived. Dependence on tourism was evident, reflecting its vital importance to the local economy.

The study concluded that there is a high degree of satisfaction with tourism among the residents of the Magical Towns studied, with an average rating that reflects an excellent perception of tourism benefits. It highlighted the need for further research and improvement of aspects such as tourism infrastructure and promotion to maximize benefits and minimize drawbacks.

The study provides a solid foundation for future improvement actions in the Yucatan tourism sector, aligned with the perceptions and needs of local residents.

The Local Satisfaction Study in Four Magical Towns of Yucatan 2023, Executive Summary, is available for consultation at:



EXECUTIVE OVERVIEW
LOCAL SATISFACTION STUDY
IN FOUR MAGICAL TOWNS OF YUCATAN 2023

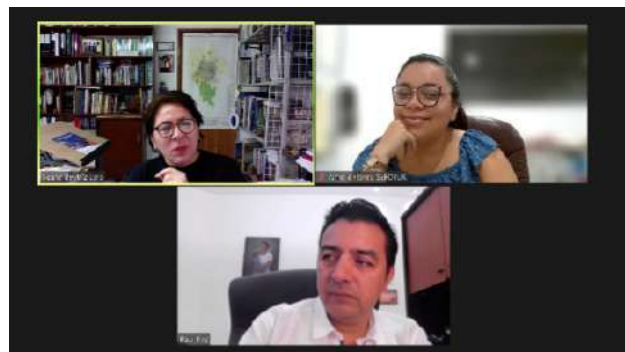
3.8 Photographic evidence of activities 2023



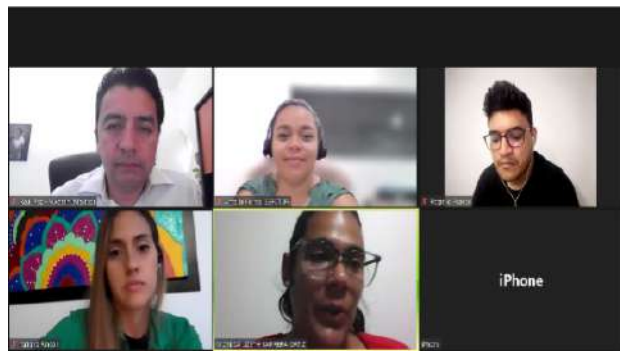
INCORPORATION OF YUCATAN INTO THE INSTO NETWORK, JANUARY 2023



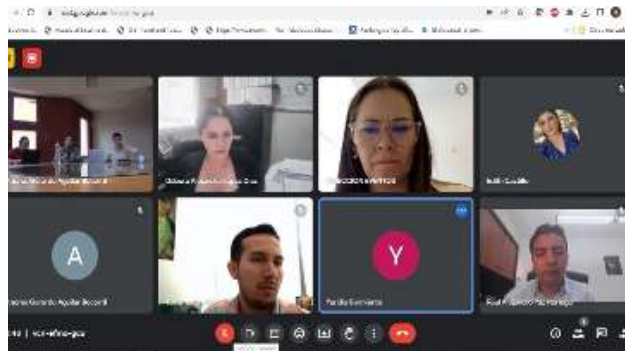
MAZATLAN OBSERVATORY, SINALOA, MARCH 2023



BUCARAMANGA OBSERVATORY, COLOMBIA, APRIL 2023



YTO WORKING GROUP



MUNDO MAYA ALLIANCE, MEXICO





4. Final Considerations



The Yucatan Tourism Observatory (YTO) began in January 2023 a long journey to become a benchmark for the measurement, analysis and evaluation of tourism sustainability in our state and in the Southeast region of Mexico.

The Yucatan Peninsula, due to its geographic characteristics and the natural, cultural and human resources it possesses, has an immense potential for sustainable tourism activities, but at the same time it faces great challenges to consolidate this model of sustainable development, which is the way to ensure that future generations will be able to adequately take advantage of the aforementioned resources.

In this first annual report of the YTO, the first qualitative and quantitative actions that this Observatory implemented during 2023 to incorporate sustainability into its mission, vision and objectives were listed, considering the 11 key areas that the INSTO establishes to evaluate progress in sustainable tourism.

Thus, during this first year as affiliates of the UN Tourism INSTO, YTO has just begun the task of establishing the first baselines that should serve to measure the progress of the main sustainability indicators in the coming years, as well as to define short, medium and long term goals, which will allow us to know the scope of tourism sustainability in economic, social, environmental and governance aspects.

In summary, during the reporting period the YTO was engaged in the measurement of 109 indicators of the 11 key areas of sustainability, having as a consequence the need to diversify the dissemination and improve in the coming years the balance of the monitored topics. As a conclusion of this topic, the challenge of balancing the focus of the YTO is derived, since currently 57% of the indicators generated by our Observatory continue to be dedicated to measuring economic aspects of sustainability.

During this reporting period, the YTO Technical Subcommittee held two ordinary meetings, which allowed us to implement a work plan consisting of 15 lines of action,

in addition to generating a specific project to learn about residents' satisfaction with tourism activity in four Magical Towns of Yucatan.

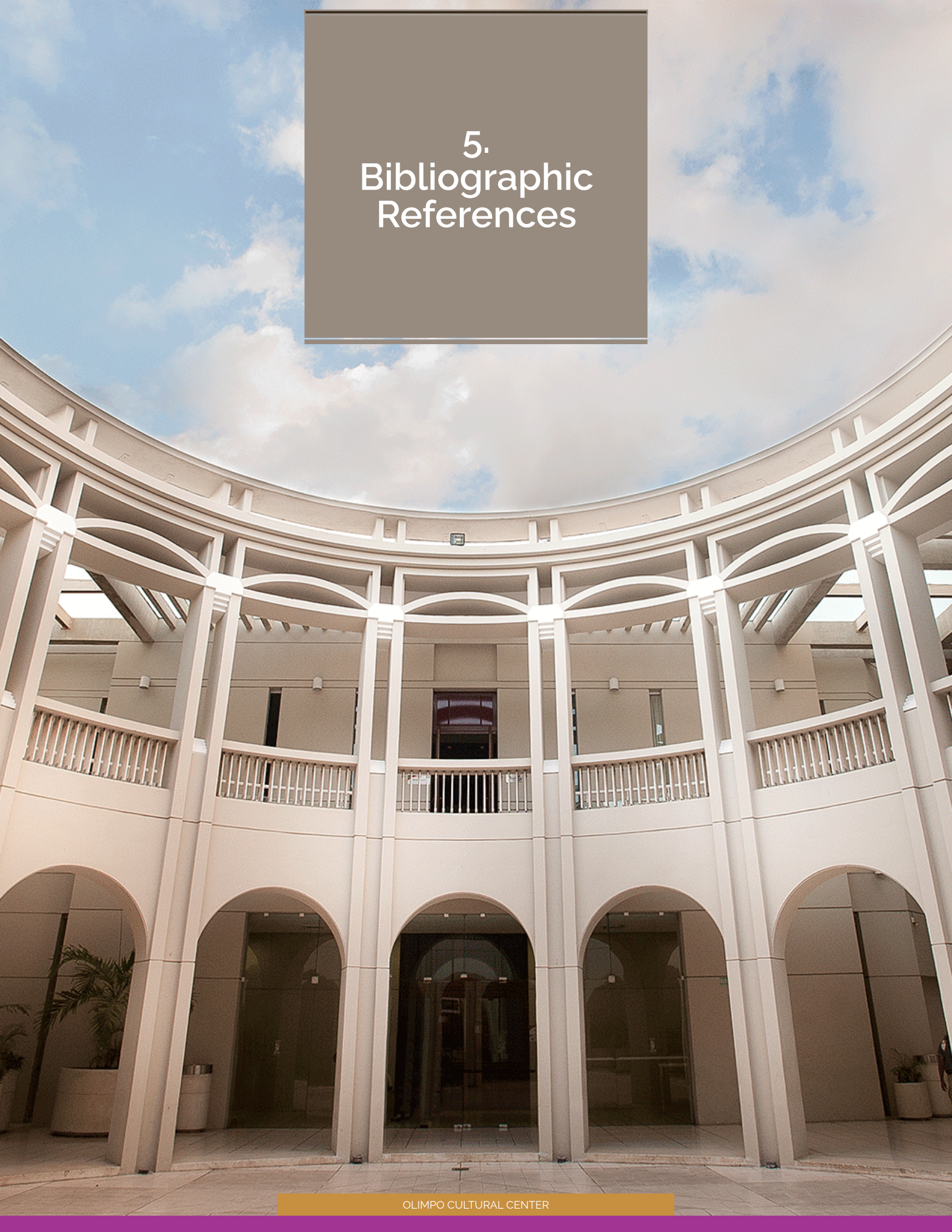
Likewise, the results of the first workshop for the definition of sustainable tourism indicators in Yucatan stand out, which allowed the establishment of agreements with groups from the private sector, the public sector, academia and civil society, to implement future actions to improve the measurements and scope of future YTO recommendations.

On the other hand, the YTO participated in a total of 6 meetings (2 participations in specialized events, in addition to the presentation of 2 papers in face-to-face mode and 2 papers in virtual mode). Likewise, five linkage actions were carried out with other Tourism Observatories (3 national and 1 international), in addition to the Maya World Mexico Alliance.

In summary, this annual work shows us that tourism management in Yucatan still has a long way to go before it can truly be considered a sustainable destination, which is why the YTO is committed to accompanying the actors of the activity in our state to meet this ambitious goal in the coming years.



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LABNA ARCHAEOLOGICAL ZONE



FORMER CONVENT OF SAN BERNARDINO DE SIENA, VALLADOLID



EK BALAM ARCHAEOLOGICAL ZONE



NIGHT OF LEGENDS, MERIDA



HENEQUEN ZONE, SOTUTA DE PEON



ARMANDO MANZANERO THEATER, MERIDA

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Digital Channels

At the Yucatan Tourism Observatory (YTO), our mission is to keep our audience informed and up-to-date on the latest news and relevant data about tourism in Yucatan. To achieve this goal, we have created a wide range of digital channels that allow you to access our information quickly and easily.

Official YTO Website:

<https://observatoryucatan.org.mx>

Social Networks:





Yucatan Tourism Observatory

<https://www.observatoryyucatan.org.mx>



Juntos transformemos
Yucatán
GOBIERNO DEL ESTADO

SEFOTUR
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INSTO

International Network
of Sustainable Tourism
Observatories

