

**THE MEXICAN CARIBBEAN
(CANCUN, COZUMEL RIVERA MAYA)**

Visitor Arrival Summary

The Mexican Caribbean destinations have emerged in the last decade to be major players in Caribbean tourism. Cancun, Cozumel and now Rivera Maya are resort destinations which rely heavily on the US market and are now extending their share of the European market.

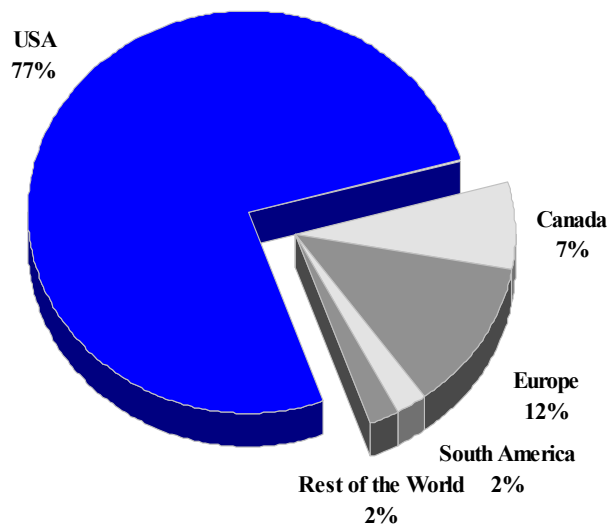
- ◆ **Cancun:** After two years of declining levels of international tourist arrivals, Cancun recorded an increase of 5.7 percent in 2003. Arrivals from the United States jumped by 7.5 percent thus pushing its share to 76.6 percent of total arrivals. Canadian visitors increased while tourist arrivals from Europe, South and Central America and the Caribbean decreased.
- ◆ **Cozumel:** A total of 304.2 thousand international tourists were hosted by Cozumel in 2003, an increase of 48.0 percent when compared to 2002. Cruise passenger arrivals to this destination rose by 15.6 percent to total 270.9 thousand in 2003. This was the largest number of arrivals to visit this destination in a single year.
- ◆ **Rivera Maya:** Tourists from the United States accounted for 45.5 percent of total arrivals to this destination in 2003 and rose by 10.5 percent. Increases were also reported in the Canadian (4.7 percent) and European (14.3 percent) markets while arrivals from South America (down 36.9 percent) continued to fall off.

TOURISM HIGHLIGHTS FOR 2003

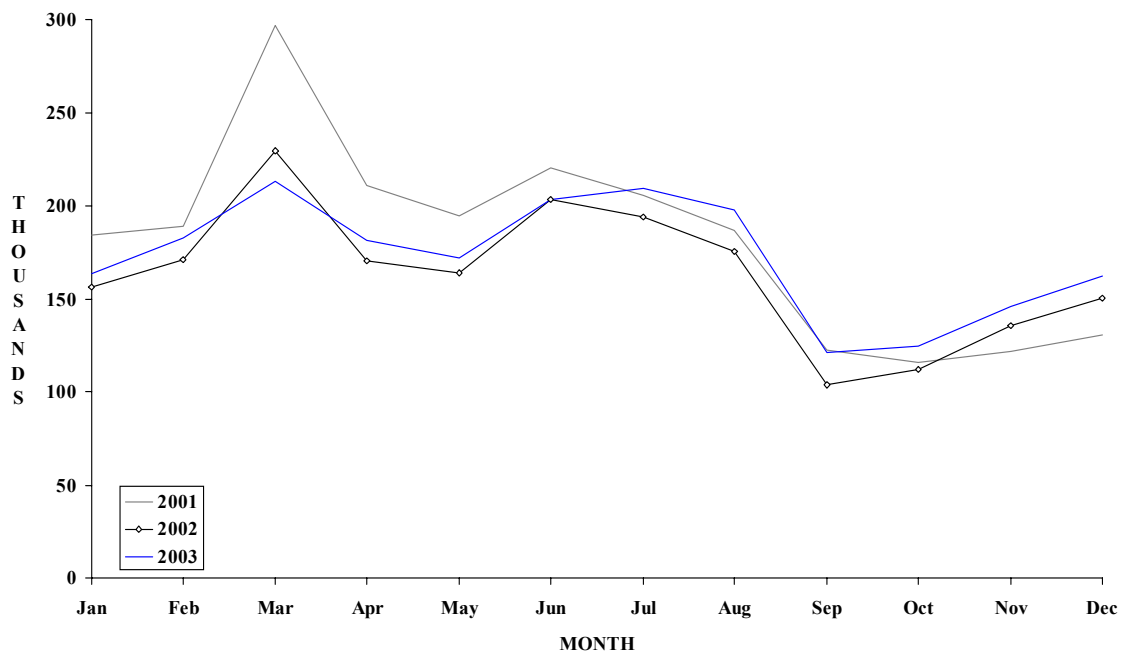
VISITOR ARRIVALS			
Cancun - Tourist Arrivals ➔	2,076,973	Cozumel - Cruise Passengers	2,708,913
➔ <i>Summer</i>	64.4%	➔ <i>Summer</i>	61.2%
➔ <i>Winter</i>	35.6%	➔ <i>Winter</i>	38.8%
Cozumel - Tourist Arrivals ➔	304,233	Cruise Ship Calls	1,305
Rivera Maya - Tourist Arrivals ➔	1,795,007		
VISITOR PROFILE		ACCOMMODATION STATISTICS	
Average Length of Stay (<i>nights</i>)		Cancun - Rooms	26,404
(<i>Cancun</i>)	4.6	Room Occupancy Rates	70.5%
(<i>Rivera Maya</i>)	6.5	Cozumel - Rooms	4,010
Cancun		Room Occupancy Rates	50.0%
Tourist Arrivals by Purpose of Visit ^{VI}		Rivera Maya - Rooms	22,624
➔ <i>Holiday</i>	93.0%	Room Occupancy Rates	77.0%
➔ <i>Business</i>	5.0%		
➔ <i>Other</i>	2.0%		
TOURISM AND OTHER RELATED ECONOMIC STATISTICS			
Total Expenditure (<i>US\$ millions</i>) Cancun	\$1,376.9	Total Expenditure (<i>US\$ millions</i>) ^e Cozumel	\$371.4

Mexico (Cancun)

TOURIST ARRIVALS BY MAIN MARKETS
2003



MONTHLY TOURIST ARRIVALS



MEXICAN CARIBBEAN - (CANCUN)

CANCUN - FOREIGN HOTEL GUEST BY COUNTRY OF ORIGIN

Country of Residence	1999	2000	2001	2002	2003	% Share 2003
United States	1532488	1751005	1619767	1479618	1590204	76.6
Canada	90218	91336	86814	119411	139285	6.7
Europe	317031	282465	335687	265175	255558	12.3
South America	108615	102404	96087	62622	50169	2.4
Central America	5717	5904	10350	10555	9757	0.5
Caribbean	3608	5222	5734	8117	6176	0.3
Japan	11139	12923	20889	14723	16380	0.8
Rest of the World	3402	4028	3387	5224	9444	0.5
TOTAL	2072218	2255287	2178715	1965445	2076973	100.0

CANCUN - FOREIGN HOTEL GUEST BY MONTH

Month	1999	2000	2001	2002	2003	% Change 2003/02
January	175538	154160	184286	156215	163389	4.6
February	176148	199094	188824	171073	182444	6.6
March	233395	274492	296760	229614	213061	-7.2
April	183909	191079	211090	170418	181204	6.3
May	182271	194231	194630	163830	172325	5.2
June	205164	225817	220111	203360	203412	0.0
July	193130	205000	205248	193867	209545	8.1
August	189145	201221	186968	175542	197557	12.5
September	137056	142492	122506	103709	121219	16.9
October	133983	149424	115725	112172	124603	11.1
November	139553	158377	121907	135564	145849	7.6
December	122926	159900	130660	150081	162365	8.2
TOTAL	2072218	2255287	2178715	1965445	2076973	5.7

MEXICAN CARIBBEAN - (COZUMEL)

COZUMEL - TOTAL TOURIST ARRIVALS

	1999	2000	2001	2002	2003	% Share 2002
National Tourists	162054	198715	215122	153386	60554	16.6
Foreign Tourists	324740	230017	240499	205585	304233	83.4
TOTAL	486794	428732	455621	358971	364787	100.0

COZUMEL - CRUISE PASSENGER ARRIVALS

Month	1999	2000	2001	2002	2003	% Change 2002/01
January	133364	137658	158293	200450	277516	38.4
February	121498	148771	134730	154963	238823	54.1
March	157249	173193	165557	213242	277583	30.2
April	126895	133366	139557	187374	256749	37.0
May	79175	101255	115208	171193	183810	7.4
June	93143	101296	117097	166168	175847	5.8
July	85205	95802	117274	190061	185495	-2.4
August	87349	111308	112502	185584	196417	5.8
September	78264	88245	88647	135559	158770	17.1
October	109124	102351	104736	177870	218870	23.1
November	69327	154540	159722	159722	240207	50.4
December	163469	156819	182044	285504	298826	4.7
TOTAL	1304062	1504604	1595367	2227690	2708913	21.6
Cruise Ship Calls	853	885	795	1168	1305	

MEXICAN CARIBBEAN (RIVERA MAYA)

RIVERA MAYA - FOREIGN TOURIST ARRIVALS BY MAIN MARKET

Country of Residence	1999	2000	2001	2002	% Share	
					2003	2003
United States	n.a	363822	603414	739808	817378	45.5
Canada	n.a	132453	220128	301565	315851	17.6
Europe	n.a	599277	516776	553022	632096	35.2
South America	n.a	48834	61585	39624	24990	1.4
Rest Of the World	n.a	3400	3830	5071	4692	0.3
TOTAL	n.a	1147786	1405733	1639090	1795007	100.0

RIVERA MAYA - FOREIGN TOURIST ARRIVALS BY MONTH

Month	1999	2000	2001	2002	% Change	
					2003	2003/02
January	n.a	87298	124325	119111	143549	20.5
February	n.a	96637	122289	142874	151273	5.9
March	n.a	102610	128681	176850	182753	3.3
April	n.a	106383	127602	149231	148389	-0.6
May	n.a	90806	116139	120838	132038	9.3
June	n.a	95363	125181	141641	143032	1.0
July	n.a	114406	147449	145078	166818	15.0
August	n.a	100007	125474	150567	166357	10.5
September	n.a	70944	85431	115394	112387	-2.6
October	n.a	87301	76557	116021	123100	6.1
November	n.a	99720	102349	133431	159144	19.3
December	n.a	96311	124256	128054	166167	29.8
TOTAL	n.a	1147786	1405733	1639090	1795007	9.5

MEXICAN CARIBBEAN TOURIST ACCOMMODATION (Hotel Rooms)

Rooms	1999	2000	2001	2002	2003
Cancun	24610	25434	26194	25829	26404
Cozumel	3956	4101	4826	4007	4010
Rivera Maya	n.a	14870	18731	21014	22624

Source: Secretaria de Estatal de Turismo - Chetumal Quintana Roo Mexico, Cancun Hotel Association

MONTSERRAT