

Japan International Cooperation Agency (JICA)
Secretariat of Tourism (SECTUR)
The Government of United Mexican States

The Study
on Formulation of Tourism Development and Promotion Strategies
for the Selected Tourism Destinations in Mexico

4

Final Report
Volume -4
Technical Documents

February, 1997

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Pacific Consultants International
System Science Consultants Inc.

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1135256 [4]

The exchange rates applied in this study are:

US\$ 1.00 = \$ 7.5 (Mexican Peso)

(As of December 1996)

PREFACE

In response to a request from the Government of United Mexican States, the Japanese Government decided to conduct a study on Formulation of Tourism Development and Promotion Strategies for the Selected Tourism Destinations in Mexico and entrusted the study to Japan International Cooperation Agency (JICA).

JICA sent to United Mexican States a study team headed by Mr. Takahide Fujihira, and composed of members from Pacific Consultants International and System Science Consultants Inc. three times from September 1995 to October 1996.

The team held discussions with concerned officials of the Government of United Mexican States, and conducted field surveys. After the team returned to Japan, further studies were made and the present report was prepared.

I hope that this report will contribute to the promotion of the project and to the enhancement of friendly relations between our two countries.

I wish to express my sincere appreciation to the officials concerned of the Government of United Mexican States for the close cooperation extended to the team.

February, 1997

A handwritten signature in black ink, reading "Kimio Fujita". The signature is written in a cursive style with a long horizontal stroke at the end.

Kimio Fujita

President

Japan International Cooperation Agency

February 1997

Mr. Kimio Fujita
President

Japan International Cooperation Agency (JICA)
Tokyo, Japan

Letter of Transmittal

Dear, Sir:

We are pleased to formally submit herewith the report of "The Study on Formulation of Tourism Development and Promotion Strategies for the Selected Tourism Destinations in Mexico".

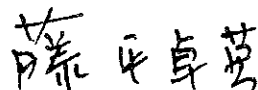
This report compiles the results of the study which was undertaken in the United Mexican States, from September 1995 to October 1996 by the study team, organized jointly by Pacific Consultants International and System Science Consultants Inc.

We owed a lot to many people for the accomplishment of this report. First, we would like to express our deep appreciation and sincere gratitude to all those extended their kind assistance and cooperation to the study team, in particular, officials concerned of Ministry of Tourism, the United Mexican States, and Mexican counterpart team.

We also acknowledge the officials of your agency, the JICA advisory committee and the Embassy of Japan in the United Mexican States.

We wish the report would be able to contribute really to Mexico's people and socio-economic development in future.

Very truly yours,



Takahide Fujihira

Team leader

The Study on Formulation of Tourism
Development and Promotion Strategies for the
Selected Tourism Destinations in Mexico

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Organization of this report

The final report is composed of 4 separate volumes. Contents of the 4 volumes are as follows:

Volume-1: Summary
(Summary of Volume-2 and Volume-3)

Volume-2: National Level Strategy
(National level tourism plans and proposals that support tourism development and promotion plans at three destinations.)

Volume 3: Regional Strategies of Selected Destinations
(Tourism development and promotion plans for chosen three destinations including financial analysis, action and initial environmental evaluation.)

Volume 4: Technical Documents
(Supplemental studies and data)

Abbreviation

AAIR	Annual Average Increase Rate (Crecimiento Promedio Anual)
API	Administration of Integral Port (Administración de Puerto Integral)
ASA	Department of Airport and Auxiliary Service (Aeropuertos y Servicios Auxiliares)
BANOBRAS	National Bank of Public works and services (Banco Nacional de Obras y Servicios Públicos)
B/C	Benefit and Cost (Beneficio y Coste)
BR	Biosphere Reserve (Reserva de la Biosfera)
CESTUR	Tourism Reserch Institute (Centro de Estudios Superiores en Turismo)
CFE	State Commission of Electric (Comisión Feferal de Electricidad)
CLFC	Central Electric and Power Company (Compañía de Luz y Fuerza del Centro)
CMPT	Mexican Tourism Promotion Council (Consejo Mexicano de promoción turística)
CNA	National Water Commission (Comicion Nacional del Agua)
EIA	Environmental Impact Assessment (Establecimiento del Impacto Ambiental)
EIRR (TIRE)	Economic Internal Rate of Return (Tasa Interna de Retorno Económico))
EPR (EPC)	Employee Per Room (Empleados Por Cuarto)
FIRR (TIRF)	Financial Internal Rate of Return (Tasa Interna de Retorno Financiero)
FIT (VTI)	Foreign Independent/Individual Travel (Viajero Totalmente Independendiente)
FNM	National Railways of Mexico (Ferrocarriles Nacional de México)
FONATUR	National Fund for Tourism Promotion (Fondo Nacional de Fomento al Turismo)
FTL (LFT)	Federal Tourism Law (Ley Federal de Turismo)
GDP (PIB)	Gross Domestic Products (Producto Interno Bruto)
GRDP (PRIB)	Gross Regional Domestic Products (Producto Regional Interno Bruto)

IDB (BID)	Interamerican Development Bank (Banco Interamericano de Desarrollo)
IEE (EIM)	Initial Environmental Examination (Evaluación Inicial del Medioambiente)
INAH	National Institute of Anthoropology and History) (Instituto Nacional de Antropología e Historia)
INE	National Institute of Ecology (Instituto Nacional de Ecología)
INEGI	National Institute of Statistics, Geography and Informatics (Instituto Nacional de Estadística Geografía e Informática)
INI	National Institute of Indigenous (Instituto Nacional Indigenista)
IPC (CIP)	Integrated Planned Center (Centros Integralmente Planeados)
ITC (CTI)	Integrated Tourism Center (Centros Turísticos Integrales)
JICA	Japan International Cooperation Agency (Agencia de Cooperación Internacional del Japón)
JNTO	Japan National Tourist Organization (Organización Nacional Turística del Japón)
JTA	Japan Tourist Associaton (Asociación Turística del Japón)
JTB	Japan Travel Bureau
LGEEPA	General Law of Environment (Ley General de Equilibrio Ecológico y Protección Ambiental)
NGO (ONG)	Non Governmental Organization (Organización No Gubernamental)
NP	National Park (Parque Nacional)
PROFEPA	Federal Agency for Environmental Protection (Procuraduría Federal de Protección Ambiental)
RCI	Resort Condominium International
SBR	Special Biosphere Reserve (Reserva especial de la Biosfera)
SCT	Secretariat(=Ministry) of Communication and Transportation (Secretaría de Comunicaciones y Transportes)
SECOFI	Secretariat of Commerce and Industrial Promotion (Secretaría de Comercio y Fomento Industrial)
SECTUR	Secretariat of Tourism (Secretaría de Turismo)
SEDESOL	Secretariat of Social Development (Secretaría de Desarrollo Social)
SEMARNAP	Secretariat of Environment, Natural resouces and Fishing (Secretaría de Medio Ambiente, Recursos Naturales y Pesca)
SES	Secretariat of Health (Secretría de Salud)

SHCP	Secretariat of Finance and Public Credit (Secretaría de Hacienda y Crédito Público)
SINAP	National System of Nature Protected Areas (Sistema Nacional de Areas Naturales Protegidas)
SIT	Special Interest Tours (Viaje de Interés Especial)
SMEs (PMEs)	Small- and Midium- sized Enterprises (Pequeñas y Medianas Empresas)
SNIT	National System of Tourism Information (Sistema Nacional de Información Turística)
UNEP (PNUMA)	United Nations Environment Programme (Programa de las Naciones Unidas para el Medio Ambiente)
VFR	Visit Friend and Relatives (Visito a Familia y Amigos)
WTO	World Tourism Organization (Organización Mundial del Turismo)

Glossary of special terms

\$	Mexican Peso (Peso mexicano)
US\$	US dollar, [US\$1 = 7.5 Mexican Pesos] (Dólar de Estados Unidos, [US\$1 = 7.5 Pesos mexicanos])
N.A. (N.D.)	Not available (No disponible)
p	Preliminary (Preliminar)
--	Non applicable (No aplicable)

Appendix -1 :

A.1. Results of marketing surveys

A.1. Results of marketing surveys

A.1.1. Questionnaire survey at major international airports

A.1.1.1. Outline of the survey

JICA study team conducted a questionnaire survey at major international airports in Mexico to supplement information on international visitors to Mexico. Since SECTUR has conducted surveys on the domestic and the North American markets, the study team designed the survey so as to focus on the rest of the market segments that had not been covered by the surveys, namely;

- European market,
- Latin American market, and
- Asia/Pacific market.

The survey items covered the following aspects of tourism market;

- Demographic profiles,
- Types of travelers and tourism benefits
- Travel itinerary,
- Evaluation of Mexican tourism,
- Tourism expenditure patterns, and
- Purchasing of tourism products and market competition.

The survey results provided the basis for formulating tourism development and promotion strategies for Mexican tourism in the following aspects;

- Creation of planning concept and strategies,
- Identification of market needs by market segment, and
- Economic and financial analysis of tourism development.

A.1.1.2. Methodology

(1) Survey period and sample size

From December 4 to December 17, 1995.

2400 samples were recovered, of which 2285 samples were identified to be valid samples.

(2) Survey sites

International departure lounges of the airports of the following cities;

- Los Cabos,
- Puerto Vallarta,
- Guadalajara,
- Mexico City, and
- Cancun.

Above cities were chosen because of large numbers of international visitor arrivals.

(3) Sampling methods and benchmark target

Stratified random sampling method was applied to choose respondents. More specifically, respondents were chosen randomly within each segment of a benchmark target shown as follows.

Table A.1.1 Bench mark target for the airport survey

	Southbound (USA & Canada)	Northbound (Latin America)	Westbound (Europe)	Eastbound (Asia & Pacific)	Total
Cacun	209	128	150	-	487
Los Cabos	97	-	-	-	97
Puerto Vallarta	149	-	117	-	266
Mexico City	409	372	233	200	1,214
Guadalajara	336	-	-	-	336
Total	1,200	500	500	200	2,400

Source: JICA study team

The benchmark target was set so as to recover statistically meaningful numbers of respondents from each market segment. Hence, shares of respondents from Latin America, Europe and Asia are larger than their actual shares of visitors to Mexico. The shares of five airports within each market segment were set in proportion to the numbers of flights to each geographical region.

Potential respondents were approached by surveyors while they were waiting for their flights in the departure lounges of the five airports. After a few questions that identify if the respondents were international visitors leaving Mexico or out-going Mexican travelers, surveyors asked appropriate respondents to complete a set of questionnaire sheets by themselves. While respondents were completing the sheets, surveyors were on hand to assist respondents in completing the sheets.

(4) Surveyors

The survey was conducted by JICA Study Team with surveyors recruited by Secretaría de Turismo with a cooperation from Instituto Nacional de Estadística Geografía e Informática.

(5) Limitation of the survey

Although the study team believes that the current survey method is the best way within the given framework of budget and manpower, the survey results have some limitation in representing the actual tourism demand to Mexico.

Firstly, the survey does not provide information on visitors in other seasons. This may underestimate the importance of incentive and convention market, and areas, peak season of which is not the Christmas.

Secondly, the survey results do not represent those who used transportation methods other than airlines such as car, rail, and ship.

Lastly, the survey did not cover all the international airports in Mexico. There still exist other important international airports such as Monterrey, Mérida, Acapulco, Mazatlán and Huatulco, which could have been covered if the budget is more abundant. It is hoped that more comprehensive survey would be conducted in the future to obtain a more detailed picture of Mexican tourism market.

A.1.1.3. Findings

For an effective overview of the results, the study team devised a market segmentation based on a few questionnaire items as shown below.

Table A.1.2 Definition of traveler segments

Traveler segment	Description	Share
Package tourist	Those who traveled for "holiday" purpose, and used a package tour.	21%
Non-package tourist	Those who traveled for "holiday" purpose, and did not use a package tour.	40%
VFR	Those who travelled to "visit friends and relatives"	12%
Business traveler	Those who travelled for "business", "incentive travel", "conference and convention", and other unclassified purposes.	27%

Source: JICA study team

Percentage breakdown of traveler segments by regional segment is shown as follows.

Table A.1.3 Percentage breakdown of traveler segments by regional market segment

	Southbound (USA & Canada)		Northbound (Latin America)		Westbound (Europe)		Eastbound (Asia & Pacific)		Paisano (Overseas Mexicans)		Total	
Package	240	24%	101	22%	110	20%	21	30%	4	3%	476	21%
Non-package	473	46%	103	23%	273	49%	24	34%	24	19%	897	40%
VFR	107	10%	33	7%	37	7%	7	10%	77	60%	261	12%
Business	201	20%	212	47%	134	24%	19	27%	24	19%	590	27%
Total	1,021	100%	449	100%	554	100%	71	100%	129	100%	2,224	100%

Source: JICA study team

Above table shows that the VFR segment constitutes 60% of the paisano market, and that the Business segment 47% of the northbound market. In all regional market segment, the non-package segment surpasses the package segment in number, which suggests the importance of independent visitors who require improvement of the travel conditions.

Survey results are shown from Table A.1. 4 to Table A.1. 8 in the following pages by combining the traveler segments and the regional market segments.

Table A.1.4 Results of airport survey by regional market segment-1

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
1. Nights spent outside of home										
1-5 nights	404	39%	158	33%	55	10%	7	10%	54	42%
6-10	452	44%	226	47%	138	24%	31	42%	40	31%
11-15	105	10%	35	7%	136	24%	8	11%	15	12%
16-20	22	2%	16	3%	72	13%	4	5%	6	5%
21-25	10	1%	7	1%	62	11%	6	8%	2	2%
25-30	10	1%	13	3%	38	7%	4	5%	8	6%
More than 1 month	21	2%	17	4%	61	11%	11	15%	5	4%
Average	8.5		12.1		22.0		25.8		10.5	
2. Nights spent in Mexico										
1-5 nights	415	40%	168	35%	72	13%	28	38%	56	43%
6-10	450	44%	227	47%	157	27%	24	33%	41	32%
11-15	97	9%	30	6%	140	24%	5	7%	13	10%
16-20	23	2%	20	4%	62	11%	3	4%	5	4%
21-25	8	1%	7	1%	50	9%	1	1%	2	2%
25-30	10	1%	12	3%	44	8%	3	4%	8	6%
More than 1 month	28	3%	15	3%	66	12%	10	14%	8	6%
Average	8.4		10.9		17.9		13.7		10.1	
3. Combined countries with Mexico										
Combined other countries	17	2%	35	7%	84	15%	38	52%	4	3%
Did not combined	1,011	98%	445	93%	489	85%	35	48%	126	97%
4. Combined countries										
Canada	2	12%	-	0%	1	1%	3	8%	-	0%
USA	3	18%	14	40%	17	20%	18	47%	2	50%
Guatemala	2	12%	4	11%	38	45%	7	18%	-	0%
Belize	2	12%	-	0%	6	7%	-	0%	-	0%
El Salvador	-	0%	2	6%	3	4%	3	8%	-	0%
Honduras	1	6%	-	0%	17	20%	2	5%	-	0%
Other C.A.	-	0%	2	6%	2	2%	1	3%	-	0%
South America	1	6%	5	14%	6	7%	4	11%	-	0%
Caribbean	7	41%	-	0%	6	7%	2	5%	2	50%
Others	2	12%	10	29%	8	10%	4	11%	-	0%
6. Accommodation used in Mexico										
Hotel	766	75%	410	85%	508	89%	69	95%	48	37%
Friend's & relative's	173	17%	67	14%	101	18%	8	11%	87	67%
Trailer park	1	0%	-	0%	1	0%	-	0%	1	1%
Camp site	7	1%	1	0%	11	2%	1	1%	-	0%
Villa & condo	121	12%	5	1%	16	3%	-	0%	2	2%
Other accommodation	29	3%	18	4%	13	2%	2	3%	8	6%
06a. Average length of stay										
Hotel	6.4		8.2		13.9		12.0		5.5	
Friend's & relative's	12.1		16.7		23.0		11.1		10.6	
Trailer park	6.0		-		20.0		-		2.0	
Campsite	12.0		18.0		14.5		20.0		-	
Villa & condo	7.9		7.0		12.2		-		7.0	
Other accommodation	21.8		37.7		35.8		33.5		13.2	
07. Traveler type										
Holiday	713	69%	204	43%	383	67%	45	62%	28	22%
VFR	107	10%	33	7%	37	6%	7	10%	77	59%
Incentive	1	0%	-	0%	1	0%	-	0%	-	0%
Convention	7	1%	31	6%	19	3%	2	3%	1	1%
Business	148	14%	127	26%	106	18%	16	22%	13	10%
Others	52	5%	85	18%	27	5%	3	4%	11	8%

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-2

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
5. Visited destinations										
Aguascalientes	7	1%	22	5%	2	0%	-	0%	1	1%
Baja California	2	0%	2	0%	2	0%	2	3%	-	0%
Los Cabos	85	8%	1	0%	8	1%	3	4%	4	3%
Rest of BCS	5	0%	-	0%	3	1%	-	0%	-	0%
Campeche	4	0%	1	0%	32	6%	1	1%	-	0%
Coahuila	5	0%	3	1%	6	1%	-	0%	1	1%
Colima	2	0%	5	1%	5	1%	1	1%	-	0%
San Cristobal	4	0%	-	0%	47	8%	3	4%	-	0%
Rest of Chiapas	7	1%	2	0%	54	9%	2	3%	2	2%
Chihuahua	-	0%	2	0%	5	1%	1	1%	-	0%
DF	292	28%	285	59%	386	67%	48	66%	68	52%
Durango	1	0%	1	0%	1	0%	-	0%	-	0%
Mexico	22	2%	13	3%	12	2%	1	1%	9	7%
Guanajuato	25	2%	12	3%	27	5%	2	3%	7	5%
Acapulco	61	6%	20	4%	72	13%	3	4%	2	2%
Ixtapa	47	5%	2	0%	14	2%	-	0%	2	2%
Taxco	16	2%	12	3%	24	4%	2	3%	1	1%
Guerrero rde	6	1%	2	0%	5	1%	-	0%	6	5%
Hidalgo	1	0%	-	0%	2	0%	-	0%	4	3%
Puerto Vallarta	162	16%	10	2%	24	4%	1	1%	4	3%
Rest of Jalisco	42	4%	46	10%	42	7%	3	4%	11	8%
Michoacan	12	1%	7	1%	14	2%	1	1%	5	4%
Morelos	33	3%	20	4%	29	5%	5	7%	12	9%
Nayarit	4	0%	5	1%	3	1%	-	0%	-	0%
Nuevo Leon	7	1%	23	5%	14	2%	3	4%	1	1%
Oaxaca	45	4%	4	1%	81	14%	8	11%	5	4%
Huatulco	9	1%	2	0%	6	1%	1	1%	-	0%
Rest of Oaxaca	10	1%	1	0%	46	8%	2	3%	2	2%
Puebla	16	2%	9	2%	41	7%	3	4%	12	9%
Queretaro	13	1%	15	3%	8	1%	-	0%	2	2%
Cancun	212	21%	116	24%	154	27%	20	27%	5	4%
Cozumel	9	1%	3	1%	9	2%	-	0%	-	0%
Q.Roo rde	14	1%	1	0%	53	9%	2	3%	-	0%
San Luis Potosi	9	1%	-	0%	9	2%	2	3%	1	1%
Sinaloa	20	2%	2	0%	9	2%	1	1%	-	0%
Sonora	1	0%	2	0%	-	0%	-	0%	-	0%
Tabasco	10	1%	3	1%	17	3%	1	1%	1	1%
Tamaulipas	5	0%	1	0%	2	0%	-	0%	1	1%
Tlaxcala	1	0%	1	0%	4	1%	-	0%	-	0%
Veracruz	17	2%	5	1%	33	6%	3	4%	7	5%
Merida	14	1%	5	1%	81	14%	8	11%	3	2%
Rest of Yucatan	6	1%	1	0%	29	5%	-	0%	-	0%
Zacatecas	1	0%	1	0%	4	1%	1	1%	-	0%
NA	3	0%	1	0%	10	2%	6	8%	-	0%

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-3

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	1,028 100%	480 100%	573 100%	73 100%	130 100%
05a. Length of stay at destinations					
Aguascalientes	2.9	5.8	2.0	-	7.0
Baja California	4.0	15.5	2.3	1.0	-
Los Cabos	6.1	7.0	8.6	4.3	4.2
Rest of BCS	5.2	-	8.7	-	-
Campeche	4.5	5.0	3.5	2.0	-
Coahuila	29.2	7.0	23.8	-	10.0
Colimax	10.0	4.6	4.6	3.0	-
San Cristobal	2.0	-	3.7	6.0	-
Rest of Chiapas	6.9	6.5	4.7	2.5	8.5
Chihuahua	5.0	2.0	5.4	14.0	-
DF	5.3	8.8	7.3	6.2	6.4
Durango	3.0	4.0	6.0	-	-
Mexico	12.4	4.2	6.2	1.0	11.8
Guanajuato	6.0	8.6	6.8	3.5	5.3
Acapulco	6.3	3.2	6.6	4.3	4.5
Ixtapa	7.2	2.5	8.2	-	4.0
Taxco	5.4	2.5	2.9	1.5	3.0
Rest of Guerrero	6.8	1.0	8.2	-	6.7
Hidalgo	4.0	-	8.0	-	9.8
Puerto Vallarta	7.9	4.5	8.5	3.0	3.8
Rest of Jalisco	4.3	5.6	8.8	5.7	8.1
Michoacan	7.8	14.4	11.3	6.0	7.5
Morelos	9.2	4.1	12.9	36.0	9.1
Nayarit	8.0	60.0	5.7	-	-
Nuevo Leon	10.7	7.5	5.5	10.0	40.0
Oaxaca	7.6	9.0	5.0	3.6	5.6
Huatulco	5.6	17.0	4.5	3.0	-
Rest of Oaxaca	9.3	150	7.2	9.5	20.0
Puebla	6.1	7.8	12.4	7.3	7.8
Queretaro	6.5	2.8	7.6	-	2.0
Cancun	6.5	6.3	7.4	5.0	5.8
Cozumel	6.6	3.7	5.6	-	-
Rest of Q.Roo	19.1	2.0	7.5	4.0	-
San Luis Potosi	5.4	-	6.3	24.5	1.0
Sinaloa	6.8	8.0	11.9	7.0	-
Sonora	1.0	13.0	-	-	-
Tabasco	11.1	2.7	5.8	1.0	15.0
Tamaulipas	6.4	29.0	4.0	-	3.0
Tlaxcala	2.0	4.0	12.2	-	-
Veracruz	8.0	6.0	6.1	8.8	5.5
Merida	7.3	2.2	5.6	2.8	6.7
Rest of Yucatan	8.2	2.0	4.7	-	-
Zacatecas	4.0	3.0	7.0	5.0	-
NA	2.3	4.0	24.9	14.7	-

Source: JICA study team

Table A.1. 4 Results of airport survey by regional market segment-4

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
8. Holiday purpose										
Beach	467	65%	83	41%	90	23%	15	33%	8	29%
Nature/wildlife	27	4%	9	4%	37	10%	1	2%	2	7%
Archaeological sites	53	7%	41	20%	140	37%	20	44%	6	21%
Colonialcities	53	7%	34	17%	48	13%	2	4%	1	4%
Indigenous culture/people	30	4%	11	5%	43	11%	2	4%	-	0%
Sports activities	34	5%	3	1%	3	1%	1	2%	1	4%
Entertainments	15	2%	4	2%	5	1%	-	0%	5	18%
Gourmet	6	1%	2	1%	1	0%	2	4%	-	0%
Shopping	6	1%	14	7%	2	1%	-	0%	3	11%
Others	22	3%	3	1%	14	4%	2	4%	2	7%
09. Travel companion										
Alone	278	27%	192	40%	207	36%	31	42%	79	61%
Spouse	338	33%	94	20%	131	23%	17	23%	14	11%
Family	143	14%	60	13%	41	7%	2	3%	24	18%
Friends	188	18%	64	13%	131	23%	14	19%	9	7%
Businessassociates	31	3%	8	2%	8	1%	5	7%	2	2%
Others	45	4%	45	9%	45	8%	4	5%	2	2%
10. Use of tour package										
Used	255	25%	114	24%	128	22%	24	33%	5	4%
Not used	773	75%	366	76%	445	78%	49	67%	125	96%
10a. Use of charter flights				0%		0%		0%		0%
Scheduled flights	162	16%	62	13%	94	16%	22	30%	5	4%
Charter flights	86	8%	51	11%	32	6%	2	3%	-	0%
10b. Purchase channel										
Travel agency	234	23%	107	22%	122	21%	24	33%	5	4%
Airline	15	1%	4	1%	3	1%	-	0%	-	0%
Others	6	1%	3	1%	3	1%	-	0%	-	0%
10c. Use of all-inclusive package										
All inclusive	143	14%	52	11%	88	15%	8	11%	4	3%
Partly inclusive	105	10%	58	12%	34	6%	14	19%	1	1%
Others	7	1%	4	1%	6	1%	2	3%	-	0%
11. Past visits										
Past visits	10	1%	6	1%	3	0%	1	2%	16	12%
First visit	379	37%	236	49%	413	72%	55	75%	10	8%
1-3 times	200	19%	82	17%	56	10%	12	16%	25	19%
3-5 times	186	18%	72	15%	60	10%	4	5%	37	28%
6 times & above	311	30%	109	23%	64	11%	3	4%	67	52%
12. Total expenditure										
Less than \$500	34	3%	7	1%	6	1%	-	0%	9	7%
\$500-1000	244	24%	60	13%	36	6%	4	5%	37	28%
\$1000-1500	265	26%	87	18%	50	9%	1	1%	32	25%
\$1500-2000	127	12%	78	16%	59	10%	3	4%	5	4%
\$2000-2500	54	5%	50	10%	81	14%	5	7%	13	10%
\$2500-3000	24	2%	19	4%	27	5%	1	1%	4	3%
\$3000-3500	24	2%	20	4%	46	8%	7	10%	8	6%
\$3500-4000	1	0%	3	1%	9	2%	1	1%	-	0%
\$4000 -	12	1%	17	4%	40	7%	25	34%	4	3%
Expenditure average		1,272		1,798		2,593		4,487		1,383

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-5

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
13. Expenditure in Mex				0%		0%		0%		0%
Less than \$500	159	15%	35	7%	47	8%	9	12%	33	25%
\$500-1000	225	22%	80	17%	71	12%	9	12%	27	21%
\$1000-1500	111	11%	45	9%	67	12%	11	15%	13	10%
\$1500-2000	49	5%	38	8%	30	5%	6	8%	8	6%
\$2000-2500	21	2%	18	4%	26	5%	5	7%	4	3%
\$2500-3000	13	1%	7	1%	19	3%	-	0%	2	2%
\$3000-3500	12	1%	7	1%	16	3%	5	7%	-	0%
\$3500-4000	3	0%	3	1%	6	1%	-	0%	1	1%
\$4000-	7	1%	8	2%	29	5%	7	10%	2	2%
Expenditure average	948		1,343		1,732		2,237		905	
14. Expenditure for shopping										
Less than \$100	464	45%	170	35%	259	45%	21	29%	53	41%
\$100-200	286	28%	63	13%	96	17%	16	22%	22	17%
\$200-300	130	13%	59	12%	55	10%	9	12%	27	21%
\$300-400	72	7%	46	10%	47	8%	2	3%	6	5%
\$400-500	19	2%	19	4%	27	5%	5	7%	3	2%
\$500-	57	6%	122	25%	89	16%	20	27%	19	15%
Shopping average	147		353	74%	217	38%	429	587%	228	176%
12a. Accompanying number of kids										
Yes	55	5%	21	4%	9	2%	2	3%	15	12%
No	973	95%	459	96%	564	98%	71	97%	115	88%
Average	1.7		1.4	0%	1.2	0%	2.5	3%	1.2	1%
12b. Number of adults in a group										
Average	1.7		1.6	0%	1.5	0%	1.6	2%	1.3	1%
15. Improvement score										
Security	1.5		2.1	0%	1.9	0%	2.0	3%	2.8	2%
Vender	1.9		2.0	0%	1.9	0%	2.2	3%	2.5	2%
Hygiene	2.0		2.0	0%	2.2	0%	2.4	3%	2.7	2%
Contact w/locals	1.4		1.4	0%	1.4	0%	1.7	2%	1.5	1%
Hotel service	1.2		1.3	0%	1.4	0%	1.7	2%	1.4	1%
Contact w/locals	1.4		1.4	0%	1.4	0%	1.7	2%	1.5	1%
Hotel services	1.2		1.3	0%	1.4	0%	1.7	2%	1.4	1%
Hotel facility	1.2		1.3	0%	1.5	0%	1.8	2%	1.5	1%
Shopping attraction	1.4		1.4	0%	1.4	0%	1.7	2%	1.4	1%
Environ. protection	2.5		2.9	1%	3.0	1%	2.5	3%	3.3	3%
Tourist info	1.7		1.9	0%	2.0	0%	2.3	3%	2.5	2%
Tour guide	1.5		1.6	0%	1.6	0%	2.0	3%	2.2	2%
Public transportation	1.8		1.7	0%	2.0	0%	2.2	3%	2.2	2%
Signs for foreigners	1.4		1.6	0%	1.6	0%	2.4	3%	1.8	1%
16. Preferable resort										
Urbanized resort	307	30%	121	25%	102	18%	16	22%	23	18%
Village type resort	494	48%	184	38%	271	47%	34	47%	45	35%
Enclave type resort	182	18%	155	32%	167	29%	20	27%	49	38%

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-6

	Southbound		Northbound		Westbound		Eastbound		Pasano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
17. Competitor										
Canada	10	1%	1	0%	3	1%	2	3%	2	2%
USA	93	9%	34	7%	9	2%	5	7%	4	3%
Guatemala	3	0%	2	0%	6	1%	1	1%	-	0%
Belize	4	0%	1	0%	-	0%	-	0%	-	0%
Honduras	1	0%	-	0%	1	0%	2	3%	-	0%
Cuba	5	0%	7	1%	4	1%	-	0%	2	2%
Europe	19	2%	1	0%	4	1%	3	4%	-	0%
Caribbean	55	5%	14	3%	10	2%	1	1%	5	4%
Central America	26	3%	7	1%	10	2%	3	4%	1	1%
South America	13	1%	15	3%	20	3%	3	4%	2	2%
Africa	-	0%	-	0%	15	3%	-	0%	-	0%
Asia	8	1%	1	0%	21	4%	-	0%	-	0%
Oceania	13	1%	6	1%	5	1%	-	0%	-	0%
Unspecified	7	1%	4	1%	5	1%	4	5%	2	2%
18. Reasons for choosing Mexico										
Price	112	11%	37	8%	41	7%	5	7%	1	1%
Travel time	29	3%	5	1%	1	0%	-	0%	3	2%
Security	1	0%	-	0%	1	0%	1	1%	-	0%
Climate	186	18%	25	5%	66	12%	8	11%	3	2%
Beach	136	13%	30	6%	40	7%	3	4%	1	1%
Tourism attractions	74	7%	53	11%	109	19%	20	27%	6	5%
Tourism services	9	1%	5	1%	4	1%	1	1%	1	1%
Shopping	2	0%	14	3%	3	1%	-	0%	2	2%
Friendly people	60	6%	17	4%	46	8%	2	3%	8	6%
Relaxing atmosphere	65	6%	15	3%	35	6%	5	7%	-	0%
Others	39	4%	3	1%	36	6%	-	0%	3	2%
19. Media influenced to visit Mexico										
Agent	266	26%	117	24%	165	29%	7	10%	10	8%
Brochure	91	9%	32	7%	56	10%	17	23%	7	5%
Advertise	57	6%	25	5%	38	7%	5	7%	3	2%
TV program	27	3%	35	7%	23	4%	2	3%	14	11%
Article	52	5%	26	5%	38	7%	10	14%	1	1%
Friends	504	49%	168	35%	210	37%	16	22%	74	57%
SECTUR	19	2%	9	2%	18	3%	3	4%	4	3%
Others	168	16%	165	34%	154	27%	28	38%	36	28%
20. Recommend Mexico to friends?										
Recommend	1,015	99%	475	99%	565	99%	70	96%	129	99%
Not recommend	13	1%	5	1%	8	1%	3	4%	1	1%
21. Want to revisit										
Yes	1,001	97%	477	99%	516	90%	63	86%	128	98%
No	27	3%	3	1%	57	10%	10	14%	2	2%

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-7

	Southbound		Northbound		Westbound		Eastbound		Pasano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
22. Destinations for the next visit										
Aguascalientes	19	2%	9	2%	22	4%	-	0%	1	1%
Baja California	27	3%	14	3%	34	6%	3	4%	10	8%
Los Cabos	84	8%	5	1%	8	1%	3	4%	6	5%
Rest of BCS	67	7%	38	8%	74	13%	3	4%	17	13%
Campeche	2	0%	1	0%	2	0%	1	1%	-	0%
Coahuila	-	0%	1	0%	2	0%	-	0%	1	1%
Colima	20	2%	9	2%	2	0%	-	0%	3	2%
San Cristobal	8	1%	5	1%	20	3%	1	1%	-	0%
Rest of Chiapas	23	2%	10	2%	46	8%	3	4%	4	3%
Chihuahua	5	0%	2	0%	9	2%	4	5%	2	2%
DF	113	11%	93	19%	65	11%	13	18%	17	13%
Durango	1	0%	-	0%	1	0%	-	0%	-	0%
Mexico	6	1%	7	1%	4	1%	1	1%	4	3%
Guanajuato	26	3%	21	4%	19	3%	-	0%	5	4%
Acapulco	136	13%	149	31%	55	10%	10	14%	29	22%
Ixtapa	74	7%	7	1%	9	2%	-	0%	8	6%
Taxco	11	1%	11	2%	16	3%	2	3%	1	1%
Rest of Guerrero	3	0%	-	0%	2	0%	-	0%	1	1%
Hidalgo	2	0%	-	0%	-	0%	-	0%	-	0%
Puerto Vallarta	183	18%	39	8%	22	4%	-	0%	16	12%
Rest of Jalisco	61	6%	54	11%	28	5%	3	4%	14	11%
Morelia	6	1%	2	0%	2	0%	-	0%	-	0%
Morelos	26	3%	11	2%	10	2%	1	1%	12	9%
Nayarit	5	0%	-	0%	1	0%	-	0%	1	1%
NuevoLeon	16	2%	28	6%	10	2%	-	0%	2	2%
Oaxaca	46	4%	13	3%	28	5%	3	4%	9	7%
Huatulco	-	0%	-	0%	-	0%	-	0%	-	0%
Rest of Oaxaca	33	3%	6	1%	29	5%	2	3%	14	11%
Puebla	13	1%	18	4%	19	3%	-	0%	3	2%
Queretaro	6	1%	8	2%	2	0%	1	1%	2	2%
Cancun	297	29%	178	37%	76	13%	10	14%	35	27%
Cozumel	69	7%	10	2%	6	1%	2	3%	4	3%
Rest of Q.Roo	20	2%	10	2%	18	3%	1	1%	-	0%
San Luis Potosi	-	0%	-	0%	3	1%	-	0%	-	0%
Sinaloa	41	4%	9	2%	9	2%	1	1%	7	5%
Sonora	5	0%	2	0%	5	1%	-	0%	1	1%
Tabasco	6	1%	3	1%	3	1%	-	0%	-	0%
Tamaulipas	3	0%	4	1%	1	0%	-	0%	2	2%
Tlaxcala	-	0%	-	0%	-	0%	-	0%	-	0%
Veracruz	95	3%	23	5%	22	4%	-	0%	8	6%
Merida	57	6%	15	3%	46	8%	5	7%	2	2%
Rest of Yucatan	37	4%	13	3%	36	6%	4	5%	5	4%
Zacatecas	9	1%	2	0%	4	1%	1	1%	2	2%
NA	84	8%	38	8%	114	20%	17	23%	9	7%

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-8

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
24. Problems encountered in Mexico										
Pollution	77	7%	83	17%	70	12%	6	8%	16	12%
Traffic	27	3%	11	2%	16	3%	2	3%	8	6%
Overcrowdedness	4	0%	4	1%	1	0%	1	1%	-	0%
Unclean	29	3%	4	1%	23	4%	2	3%	3	2%
Street	7	1%	2	0%	2	0%	-	0%	1	1%
Climate	8	1%	7	1%	2	0%	-	0%	1	1%
Security	14	1%	12	3%	31	5%	2	3%	10	8%
Signs for foreigners	2	0%	-	0%	5	1%	-	0%	-	0%
Poverty	25	2%	9	2%	37	6%	-	0%	-	0%
No respect for rules	3	0%	1	0%	2	0%	-	0%	-	0%
Transportation	13	1%	1	0%	15	3%	-	0%	3	2%
Lack of hospitality	5	0%	2	0%	7	1%	1	1%	3	2%
Indecency	-	0%	1	0%	-	0%	-	0%	-	0%
Crime	6	1%	3	1%	8	1%	-	0%	-	0%
Language barrier	15	1%	-	0%	5	1%	1	1%	-	0%
Corruption	5	0%	1	0%	6	1%	-	0%	2	2%
Beggar	5	0%	2	0%	3	1%	-	0%	-	0%
Telephose service	6	1%	3	1%	1	0%	-	0%	1	1%
Public services	9	1%	2	0%	3	1%	-	0%	1	1%
Tourist services	50	5%	8	2%	13	2%	1	1%	1	1%
Food	43	4%	15	3%	24	4%	1	1%	-	0%
Street vendors	56	5%	14	3%	11	2%	-	0%	1	1%
Fading Mexican culture	1	0%	3	1%	6	1%	-	0%	-	0%
Bureaucratic officers	3	0%	9	2%	6	1%	1	1%	1	1%
Poor public services	1	0%	4	1%	1	0%	-	0%	2	2%
Taxi	18	2%	15	3%	7	1%	-	0%	3	2%
Public transportation	18	2%	15	3%	7	1%	-	0%	3	2%
Police	15	1%	7	1%	7	1%	2	3%	2	2%
Political problems	8	1%	7	1%	13	2%	1	1%	9	7%
Not punctual	2	0%	-	0%	3	1%	-	0%	1	1%
Lack of promotion	-	0%	-	0%	-	0%	1	1%	-	0%
Taboos	-	0%	-	0%	1	0%	-	0%	-	0%
Machismo	-	0%	-	0%	3	1%	-	0%	-	0%
American influence	4	0%	1	0%	13	2%	1	1%	-	0%
Airport	435	42%	200	42%	173	30%	32	44%	52	40%
Too many Americans	1	0%	-	0%	13	2%	-	0%	-	0%

Source: JICA study team

Table A.1.4 Results of airport survey by regional market segment-9

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	1,028	100%	480	100%	573	100%	73	100%	130	100%
25. Male/female										
Male	575	56%	293	61%	347	61%	51	70%	80	62%
Female	453	44%	187	39%	226	39%	22	30%	50	38%
26. Age										
15-19	16	2%	12	3%	2	0%	-	0%	1	1%
20-24	86	8%	44	9%	54	9%	3	4%	9	7%
25-29	128	12%	72	15%	99	17%	22	30%	14	11%
30-34	138	13%	65	14%	86	15%	18	25%	36	28%
35-39	121	12%	68	14%	64	11%	6	8%	23	18%
40-44	117	11%	62	13%	47	8%	12	16%	16	12%
45-49	103	10%	60	13%	57	10%	5	7%	14	11%
50-54	111	11%	40	8%	52	9%	4	5%	8	6%
55-59	72	7%	23	5%	40	7%	-	0%	3	2%
60-64	66	6%	20	4%	38	7%	2	3%	3	2%
65-	70	7%	14	3%	34	6%	1	1%	3	2%
27. Marital status										
Single	347	34%	130	27%	247	43%	35	48%	29	22%
Married	621	60%	317	66%	283	49%	38	52%	91	70%
Others	60	6%	33	7%	43	8%	-	0%	10	8%
29. Occupation										
Management	135	13%	81	17%	94	16%	12	16%	7	5%
Sales/marketing	118	11%	59	12%	46	8%	4	5%	5	4%
Government/military	27	3%	23	5%	23	4%	4	5%	2	2%
Professional	262	25%	140	29%	144	25%	15	21%	20	15%
Teacher	35	3%	21	4%	20	3%	1	1%	2	2%
Self-employed	96	9%	25	5%	32	6%	8	11%	15	12%
Employees	162	16%	36	8%	102	18%	18	25%	50	38%
Student	38	4%	32	7%	27	5%	1	1%	6	5%
Housewife	46	4%	38	8%	19	3%	1	1%	18	14%
Retired	97	9%	12	3%	57	10%	3	4%	3	2%
Others	12	1%	13	3%	9	2%	6	8%	2	2%
30a. Traveler segment										
Package tourists	240	23%	101	21%	110	19%	21	29%	4	3%
Non-package tourists	473	46%	103	21%	273	48%	24	33%	24	18%
VFR	107	10%	33	7%	37	6%	7	10%	77	59%
Business traveler	201	20%	212	44%	134	23%	19	26%	24	18%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-1

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
1. Total nights spent					
1-5 nights	88 36.7%	15 14.9%	3 2.7%	3 14.3%	3 75.0%
6-10 nights	129 53.8%	74 73.3%	19 17.3%	15 71.4%	1 25.0%
11-15 nights	19 7.9%	8 7.9%	57 51.8%	2 9.5%	0 0.0%
16-20	2 0.8%	2 2.0%	17 15.5%	0 0.0%	0 0.0%
21-25	2 0.8%	1 1.0%	7 6.4%	0 0.0%	0 0.0%
26-30	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
More than 1 month	0 0.0%	0 0.0%	7 6.4%	0 0.0%	0 0.0%
Average	6.5	8.7	15.3	14.5	4.2
2. Nights spent in Mex					
1-5 nights	95 39.6%	19 18.8%	4 3.6%	11 52.4%	3 75.0%
6-10	126 52.5%	73 72.3%	31 28.2%	9 42.9%	1 25.0%
11-15	15 6.3%	7 6.9%	58 52.7%	1 4.8%	0 0.0%
16-20	3 1.3%	2 2.0%	11 10.0%	0 0.0%	0 0.0%
21-25	1 0.4%	0 0.0%	5 4.5%	0 0.0%	0 0.0%
25-30	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
30-	0 0.0%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
Average	6.2	6.9	12.5	5.7	4.2
3. Combined countries					
Combined	8 3.3%	9 8.9%	19 17.3%	11 52.4%	0 0.0%
Not combined	232 96.7%	92 91.1%	91 82.7%	10 47.6%	4 100.0%
4. Combined countries					
Canada	1 0.4%	0 0.0%	1 0.9%	1 4.8%	0 0.0%
USA	0 0.0%	3 3.0%	0 0.0%	10 47.6%	0 0.0%
Guatemala	0 0.0%	1 1.0%	12 10.9%	0 0.0%	0 0.0%
Belize	1 0.4%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
El Salvador	0 0.0%	0 0.0%	1 0.9%	1 4.8%	0 0.0%
Honduras	0 0.0%	0 0.0%	11 10.0%	0 0.0%	0 0.0%
Other C.A.	0 0.0%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
South America	0 0.0%	2 2.0%	1 0.9%	0 0.0%	0 0.0%
Caribbean	5 2.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Others	1 0.4%	1 1.0%	3 2.7%	0 0.0%	0 0.0%
6. Accommodation type					
Hotel	220 91.7%	99 98.0%	110 100.0%	20 95.2%	4 100.0%
Friend's & relative's	3 1.3%	2 2.0%	6 5.5%	1 4.8%	0 0.0%
Trailer park	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Camp site	0 0.0%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
Villa & condo	19 7.9%	1 1.0%	1 0.9%	0 0.0%	0 0.0%
Other accommodation	1 0.4%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
06a. Average nights					
Hotel (tourist nights)	6.3 2.6%	6.7 6.6%	11.9 10.8%	5.6 26.7%	4.2 105.0%
Friend's & relative's (nights)	2.3 1.0%	9.5 9.4%	7.5 6.8%	7 33.3%	0 0.0%
Trailer park	6 2.5%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Campsite	0 0.0%	0 0.0%	8 7.3%	0 0.0%	0 0.0%
Villa & condo	5.5 2.3%	6 5.9%	1 0.9%	0 0.0%	0 0.0%
Other accommodation	4 1.7%	0 0.0%	11 10.0%	0 0.0%	0 0.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-2

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
5. Visited destination					
Aguascalientes	2 0.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Baja California	0 0.0%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
Los Cabos	31 12.9%	1 1.0%	1 0.9%	0 0.0%	3 75.0%
Rest of BCS	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Campeche	0 0.0%	0 0.0%	22 20.0%	0 0.0%	0 0.0%
Coahuila	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Colima	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
San Cristobal	0 0.0%	0 0.0%	16 14.5%	0 0.0%	0 0.0%
Rest of Chiapas	0 0.0%	0 0.0%	15 13.6%	0 0.0%	0 0.0%
Chihuahua	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
DF	9 3.8%	22 21.8%	81 73.6%	9 42.9%	0 0.0%
Durango	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Mexico	0 0.0%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
Guanajuato	1 0.4%	1 1.0%	3 2.7%	0 0.0%	0 0.0%
Acapulco	14 5.8%	4 4.0%	16 14.5%	0 0.0%	0 0.0%
Ixtapa	14 5.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Taxco	2 0.8%	3 3.0%	8 7.3%	0 0.0%	0 0.0%
Guerrero rde	2 0.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Hidalgo	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Puerto Vallarta	65 27.1%	2 2.0%	2 1.8%	0 0.0%	1 25.0%
Rest of Jalisco	7 2.9%	2 2.0%	1 0.9%	0 0.0%	0 0.0%
Michoacan	1 0.4%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
Morelos	0 0.0%	3 3.0%	5 4.5%	0 0.0%	0 0.0%
Nayarit	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Nuevo Leon	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Oaxaca	4 1.7%	1 1.0%	27 24.5%	4 19.0%	0 0.0%
Huatulco	5 2.1%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
Rest of Oaxaca	1 0.4%	0 0.0%	9 8.2%	0 0.0%	0 0.0%
Puebla	1 0.4%	1 1.0%	12 10.9%	0 0.0%	0 0.0%
Queretaro	0 0.0%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
Cancun	87 36.3%	80 79.2%	62 56.4%	14 66.7%	0 0.0%
Cozumel	6 2.5%	2 2.0%	0 0.0%	0 0.0%	0 0.0%
Q.Roo rde	2 0.8%	0 0.0%	7 6.4%	0 0.0%	0 0.0%
San Luis Potosi	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Sinaloa	3 1.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Sonora	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tabasco	0 0.0%	1 1.0%	2 1.8%	1 4.8%	0 0.0%
Tamaulipas	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tlaxcala	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Veracruz	1 0.4%	0 0.0%	9 8.2%	0 0.0%	0 0.0%
Merida	1 0.4%	3 3.0%	29 26.4%	3 14.3%	0 0.0%
Rest of Yucatan	1 0.4%	1 1.0%	7 6.4%	0 0.0%	0 0.0%
Zacatecas	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
NA	1 0.4%	0 0.0%	1 0.9%	3 14.3%	0 0.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-3

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	240	100.0%	101	100.0%	110	100.0%	21	100.0%	4	100.0%
05a. Destination (nights)										
Acapulco	3.8	1.6%	2.8	2.8%	5	4.5%	0	0.0%	0	0.0%
Aguascalientes	4	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Baja California	0	0.0%	0	0.0%	1	0.9%	0	0.0%	0	0.0%
Campeche	0	0.0%	0	0.0%	1.6	1.5%	0	0.0%	0	0.0%
Cancun	5.8	2.4%	6.3	6.2%	7.4	6.7%	4.2	20.0%	0	0.0%
Chihuahua	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Coahuila	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Colimax	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Cozumel	5.8	2.4%	4	4.0%	0	0.0%	0	0.0%	0	0.0%
DF	4.1	1.7%	4.6	4.6%	4	3.6%	3.1	14.8%	0	0.0%
Durango	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Guanajuato	2	0.8%	2	2.0%	4	3.6%	0	0.0%	0	0.0%
Hidalgo	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Huatulco	5.4	2.3%	4	4.0%	0	0.0%	0	0.0%	0	0.0%
Ixtapa	5.7	2.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Los Cabos	3.6	1.5%	7	6.9%	6	5.5%	0	0.0%	4.3	107.5%
Merida	4	1.7%	2	2.0%	2.6	2.4%	2	9.5%	0	0.0%
Mexico	0	0.0%	2	2.0%	0	0.0%	0	0.0%	0	0.0%
Michoacan	2	0.8%	0	0.0%	1	0.9%	0	0.0%	0	0.0%
Morelos	0	0.0%	2.3	2.3%	6	5.5%	0	0.0%	0	0.0%
Nayarit	6	2.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Nuevo Leon	2	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Oaxaca	3.8	1.6%	2	2.0%	2.7	2.5%	1.8	8.6%	0	0.0%
Puebla	4	1.7%	1	1.0%	1.5	1.4%	0	0.0%	0	0.0%
Puerto Vallarta	7.8	3.3%	7.5	7.4%	11	10.0%	0	0.0%	4	100.0%
Queretaro	0	0.0%	2	2.0%	0	0.0%	0	0.0%	0	0.0%
Rest of BCS	4	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Chiapas	8	3.3%	0	0.0%	3.3	3.0%	0	0.0%	0	0.0%
Rest of Guerrero	4	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Jalisco	4.4	1.8%	2.5	2.5%	2	1.8%	0	0.0%	0	0.0%
Rest of Oaxaca	7	2.9%	0	0.0%	4.2	3.8%	0	0.0%	0	0.0%
Rest of Q.Roo	1.5	0.6%	0	0.0%	4.9	4.5%	0	0.0%	0	0.0%
Rest of Yucatan	13	5.4%	2	2.0%	2.3	2.1%	0	0.0%	0	0.0%
San Cristobal	0	0.0%	0	0.0%	2.3	2.1%	0	0.0%	0	0.0%
San Luis Potosi	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sinaloa	4.7	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sonora	1	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tabasco	0	0.0%	1	1.0%	1.5	1.4%	1	4.8%	0	0.0%
Tamaulipas	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taxco	1	0.4%	2.3	2.3%	1.5	1.4%	0	0.0%	0	0.0%
Tlaxcala	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Veracruz	4	1.7%	0	0.0%	3.8	3.5%	0	0.0%	0	0.0%
Zacatecas	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
NA	3	1.3%	0	0.0%	15	13.6%	6	28.6%	0	0.0%
07. Traveler type										
Holiday	240	100.0%	101	100.0%	110	100.0%	21	100.0%	4	100.0%
VFR	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Incentive	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Convention	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Business	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Others	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-4

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
8. Holiday purpose					
Beach	195 81.3%	61 60.4%	20 18.2%	10 47.6%	2 50.0%
Nature/wildlife	8 3.3%	3 3.0%	9 8.2%	0 0.0%	1 25.0%
Archaeological sites	14 5.8%	16 15.8%	58 52.7%	10 47.6%	0 0.0%
Colonial cities	3 1.3%	7 6.9%	9 8.2%	0 0.0%	0 0.0%
Indigenous culture/people	4 1.7%	5 5.0%	11 10.0%	0 0.0%	0 0.0%
Sports activities	6 2.5%	1 1.0%	1 0.9%	0 0.0%	0 0.0%
Entertainments	1 0.4%	2 2.0%	0 0.0%	0 0.0%	0 0.0%
Gourmet	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Shopping	1 0.4%	5 5.0%	1 0.9%	0 0.0%	0 0.0%
Others	8 3.3%	1 1.0%	1 0.9%	1 4.8%	1 25.0%
09. Travel companion					
Alone	16 6.7%	8 7.9%	16 14.5%	4 19.0%	0 0.0%
Spouse	128 53.3%	51 50.5%	45 40.9%	12 57.1%	1 25.0%
Family	34 14.2%	18 17.8%	7 6.4%	0 0.0%	0 0.0%
Friends	52 21.7%	23 22.8%	32 29.1%	4 19.0%	3 75.0%
Business associates	6 2.5%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
Others	2 0.8%	0 0.0%	2 1.8%	1 4.8%	0 0.0%
10. Use of tour package					
Used	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
Not used	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
10a. Use of charter flights					
Scheduled flights	147 61.3%	51 50.5%	79 71.8%	19 90.5%	4 100.0%
Charter flights	86 35.8%	49 48.5%	30 27.3%	2 9.5%	0 0.0%
10b. Purchase channel					
Travel agency	221 92.1%	96 95.0%	105 95.5%	21 100.0%	4 100.0%
Airline	15 6.3%	3 3.0%	3 2.7%	0 0.0%	0 0.0%
Others	4 1.7%	2 2.0%	2 1.8%	0 0.0%	0 0.0%
10c. All-inclusive package					
All inclusive	135 56.3%	47 46.5%	77 70.0%	7 33.3%	3 75.0%
Partly inclusive	99 41.3%	51 50.5%	29 26.4%	13 61.9%	1 25.0%
Others	6 2.5%	3 3.0%	4 3.6%	1 4.8%	0 0.0%
11. Past visits					
Past visits	3.5 1.5%	0.9 0.9%	0.7 0.6%	0.2 1.0%	1.8 45.0%
First visit	115 47.9%	84 83.2%	101 91.8%	19 90.5%	2 50.0%
1-3 times	50 20.8%	9 8.9%	2 1.8%	2 9.5%	2 50.0%
3-5 times	50 20.8%	7 6.9%	1 0.9%	0 0.0%	1 25.0%
6 times & above	40 16.7%	5 5.0%	6 5.5%	0 0.0%	0 0.0%
12. Total expenditure					
Less than \$500	9 3.8%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
\$500-1000	66 27.5%	9 8.9%	4 3.6%	3 14.3%	1 25.0%
\$1000-1500	75 31.3%	23 22.8%	7 6.4%	0 0.0%	1 25.0%
\$1500-2000	32 13.3%	32 31.7%	8 7.3%	1 4.8%	0 0.0%
\$2000-2500	11 4.6%	8 7.9%	18 16.4%	0 0.0%	0 0.0%
\$2500-3000	3 1.3%	5 5.0%	13 11.8%	0 0.0%	0 0.0%
\$3000-3500	4 1.7%	3 3.0%	16 14.5%	2 9.5%	0 0.0%
\$3500-4000	0 0.0%	0 0.0%	3 2.7%	1 4.8%	0 0.0%
\$4000 -	1 0.4%	1 1.0%	6 5.5%	8 38.1%	0 0.0%
Expenditure average	1160	1553	2407	3500	875

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-5

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
13. Expenditure in Mex					
Less than \$500	35 14.6%	6 5.9%	16 14.5%	1 4.8%	1 25.0%
\$500-1000	55 22.9%	18 17.8%	11 10.0%	1 4.8%	1 25.0%
\$1000-1500	24 10.0%	5 5.0%	17 15.5%	1 4.8%	0 0.0%
\$1500-2000	5 2.1%	10 9.9%	3 2.7%	3 14.3%	0 0.0%
\$2000-2500	7 2.9%	2 2.0%	1 0.9%	3 14.3%	0 0.0%
\$2500-3000	1 0.4%	0 0.0%	4 3.6%	0 0.0%	0 0.0%
\$3000-3500	0 0.0%	3 3.0%	0 0.0%	1 4.8%	0 0.0%
\$3500-4000	0 0.0%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
\$4000-	1 0.4%	2 2.0%	5 4.5%	3 14.3%	0 0.0%
Expenditure average	774	1388	1299	2685	375
14. Shopping expenditure					
Less than \$100	100 41.7%	28 27.7%	40 36.4%	7 33.3%	2 50.0%
\$100-200	87 36.3%	20 19.8%	24 21.8%	3 14.3%	2 50.0%
\$200-300	30 12.5%	17 16.8%	14 12.7%	1 4.8%	0 0.0%
\$300-400	12 5.0%	5 5.0%	9 8.2%	1 4.8%	0 0.0%
\$400-500	1 0.4%	9 8.9%	6 5.5%	0 0.0%	0 0.0%
\$500-	10 4.2%	22 21.8%	17 15.5%	9 42.9%	0 0.0%
Shopping average	133	280	216	629	82.5
12a. Accompanying kids					
Yes	13 5.4%	5 5.0%	0 0.0%	0 0.0%	0 0.0%
No	227 94.6%	96 95.0%	110 100.0%	21 100.0%	4 100.0%
Average	1.7	1.6	-	-	-
12b. Total number of adults					
Average group size	1.9	2	1.7	1.8	1.2
15. Improvement score					
Security	1.2 0.5%	1.5 1.5%	1.5 1.4%	1.8 8.6%	1.8 45.0%
Vender	2 0.8%	1.7 1.7%	2.1 1.9%	2.1 10.0%	3 75.0%
Hygiene	1.5 0.6%	1.6 1.6%	2.2 2.0%	2.4 11.4%	2.2 55.0%
Contact w/locals	1.3 0.5%	1.3 1.3%	1.6 1.5%	1.5 7.1%	1 25.0%
Hotel service	1.2 0.5%	1.2 1.2%	1.6 1.5%	1.6 7.6%	1 25.0%
Contact w/locals	1.3 0.5%	1.3 1.3%	1.6 1.5%	1.5 7.1%	1 25.0%
Hotel services	1.2 0.5%	1.2 1.2%	1.6 1.5%	1.6 7.6%	1 25.0%
Hotel facility	1.2 0.5%	1.2 1.2%	1.6 1.5%	1.7 8.1%	1 25.0%
Shopping attraction	1.3 0.5%	1.3 1.3%	1.4 1.3%	1.6 7.6%	1.5 37.5%
Environ. protection	1.8 0.8%	1.8 1.8%	2.5 2.3%	2.5 11.9%	1.7 42.5%
Tourist info	1.6 0.7%	1.5 1.5%	1.8 1.6%	2.2 10.5%	0 0.0%
Tour guide	1.4 0.6%	1.4 1.4%	1.5 1.4%	2 9.5%	1 25.0%
Public transportation	1.6 0.7%	1.5 1.5%	2.1 1.9%	1.9 9.0%	1 25.0%
Signs for foreigners	1.3 0.5%	1.4 1.4%	1.4 1.3%	2.4 11.4%	1.2 30.0%
16. Resort type					
Urbanized resort	89 37.1%	35 34.7%	25 22.7%	8 38.1%	1 25.0%
Village type resort	113 47.1%	47 46.5%	60 54.5%	8 38.1%	2 50.0%
Enclave type resort	36 15.0%	17 16.8%	23 20.9%	5 23.8%	1 25.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-6

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
17. Competitor					
Canada	1 0.4%	0 0.0%	2 1.8%	1 4.8%	0 0.0%
USA	30 12.5%	10 9.9%	0 0.0%	2 9.5%	0 0.0%
Guatemala	1 0.4%	0 0.0%	1 0.9%	1 4.8%	0 0.0%
Belize	2 0.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Honduras	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Cuba	3 1.3%	3 3.0%	1 0.9%	0 0.0%	0 0.0%
Europe	1 0.4%	1 1.0%	1 0.9%	2 9.5%	0 0.0%
Caribbean	32 13.3%	7 6.9%	5 4.5%	1 4.8%	0 0.0%
Central America	8 3.3%	2 2.0%	1 0.9%	1 4.8%	0 0.0%
South America	2 0.8%	3 3.0%	2 1.8%	0 0.0%	0 0.0%
Africa	0 0.0%	0 0.0%	5 4.5%	0 0.0%	0 0.0%
Asia	1 0.4%	0 0.0%	7 6.4%	0 0.0%	0 0.0%
Oceania	0 0.0%	4 4.0%	0 0.0%	0 0.0%	0 0.0%
Unspecified	2 0.8%	3 3.0%	2 1.8%	2 9.5%	0 0.0%
18. Mex's strength					
Price	41 17.1%	17 16.8%	9 8.2%	2 9.5%	0 0.0%
Travel time	11 4.6%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
Security	0 0.0%	0 0.0%	1 0.9%	0 0.0%	0 0.0%
Climate	76 31.7%	18 17.8%	21 19.1%	4 19.0%	1 25.0%
Beach	57 23.8%	17 16.8%	9 8.2%	2 9.5%	0 0.0%
Tourism attractions	14 5.8%	25 24.8%	39 35.5%	12 57.1%	2 50.0%
Tourism services	1 0.4%	1 1.0%	1 0.9%	0 0.0%	1 25.0%
Shopping	0 0.0%	4 4.0%	1 0.9%	0 0.0%	0 0.0%
Friendly people	11 4.6%	6 5.9%	8 7.3%	1 4.8%	0 0.0%
Relaxing atmosphere	21 8.8%	11 10.9%	9 8.2%	0 0.0%	0 0.0%
Others	8 3.3%	1 1.0%	12 10.9%	0 0.0%	0 0.0%
19. Influence					
Agent	126 52.5%	47 46.5%	68 61.8%	4 19.0%	2 50.0%
Brochure	30 12.5%	12 11.9%	9 8.2%	11 52.4%	0 0.0%
Advertise	20 8.3%	7 6.9%	7 6.4%	2 9.5%	0 0.0%
TV program	4 1.7%	6 5.9%	5 4.5%	0 0.0%	0 0.0%
Article	15 6.3%	11 10.9%	6 5.5%	2 9.5%	0 0.0%
Friends	81 33.8%	37 36.6%	24 21.8%	5 23.8%	1 25.0%
SECTUR	6 2.5%	0 0.0%	4 3.6%	1 4.8%	1 25.0%
Others	9 3.8%	6 5.9%	15 13.6%	2 9.5%	1 25.0%
20. Recommend Mex					
Recommend	237 98.8%	101 100.0%	110 100.0%	20 95.2%	4 100.0%
Not recommend	3 1.3%	0 0.0%	0 0.0%	1 4.8%	0 0.0%
21. Want to revisit					
Yes	233 97.1%	99 98.0%	87 79.1%	18 85.7%	4 100.0%
No	7 2.9%	2 2.0%	23 20.9%	3 14.3%	0 0.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-7

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
22. Destination for revisit					
Aguascalientes	1 0.4%	1 1.0%	3 2.7%	0 0.0%	0 0.0%
Baja California	0 0.0%	2 2.0%	4 3.6%	0 0.0%	1 25.0%
Los Cabos	27 11.3%	0 0.0%	0 0.0%	0 0.0%	2 50.0%
Rest of BCS	16 6.7%	5 5.0%	14 12.7%	0 0.0%	0 0.0%
Campeche	0 0.0%	0 0.0%	1 0.9%	1 4.8%	0 0.0%
Coahuila	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Colima	7 2.9%	2 2.0%	0 0.0%	0 0.0%	0 0.0%
San Cristobal	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Rest of Chiapas	2 0.8%	0 0.0%	5 4.5%	0 0.0%	0 0.0%
Chihuahua	0 0.0%	0 0.0%	2 1.8%	2 9.5%	0 0.0%
DF	15 6.3%	32 31.7%	16 14.5%	4 19.0%	0 0.0%
Durango	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Mexico	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Guanajuato	0 0.0%	1 1.0%	1 0.9%	0 0.0%	0 0.0%
Acapulco	24 10.0%	33 32.7%	10 9.1%	3 14.3%	1 25.0%
Ixtapa	21 8.8%	2 2.0%	0 0.0%	0 0.0%	0 0.0%
Taxco	0 0.0%	1 1.0%	3 2.7%	0 0.0%	0 0.0%
Rest of Guerrero	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Hidalgo	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Puerto Vallarta	45 18.8%	6 5.9%	2 1.8%	0 0.0%	2 50.0%
Rest of Jalisco	5 2.1%	8 7.9%	5 4.5%	1 4.8%	0 0.0%
Morelia	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Morelos	1 0.4%	2 2.0%	2 1.8%	0 0.0%	0 0.0%
Nayarit	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Nuevo Leon	2 0.8%	2 2.0%	4 3.6%	0 0.0%	0 0.0%
Oaxaca	3 1.3%	1 1.0%	4 3.6%	1 4.8%	0 0.0%
Huatulco	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Rest of Oaxaca	3 1.3%	1 1.0%	4 3.6%	0 0.0%	1 25.0%
Puebla	0 0.0%	2 2.0%	3 2.7%	0 0.0%	0 0.0%
Queretaro	0 0.0%	1 1.0%	0 0.0%	0 0.0%	0 0.0%
Cancun	101 42.1%	42 41.6%	17 15.5%	5 23.8%	2 50.0%
Cozumel	28 11.7%	6 5.9%	1 0.9%	1 4.8%	0 0.0%
Rest of Q.Roo	8 3.3%	5 5.0%	4 3.6%	0 0.0%	0 0.0%
San Luis Potosi	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Sinaloa	10 4.2%	3 3.0%	0 0.0%	0 0.0%	0 0.0%
Sonora	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tabasco	0 0.0%	1 1.0%	1 0.9%	0 0.0%	0 0.0%
Tamaulipas	1 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tlaxcala	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Veracruz	2 0.8%	1 1.0%	1 0.9%	0 0.0%	0 0.0%
Merida	5 2.1%	0 0.0%	11 10.0%	2 9.5%	0 0.0%
Rest of Yucatan	7 2.9%	3 3.0%	0 0.0%	0 0.0%	0 0.0%
Zacatecas	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
NA	18 7.5%	8 7.9%	23 20.9%	6 28.6%	0 0.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-8

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	240	100.0%	101	100.0%	110	100.0%	21	100.0%	4	100.0%
24. Problems										
Pollution	5	2.1%	3	3.0%	6	5.5%	0	0.0%	0	0.0%
Traffic	2	0.8%	2	2.0%	0	0.0%	0	0.0%	0	0.0%
Overcrowdedness	0	0.0%	0	0.0%	0	0.0%	1	4.8%	0	0.0%
Unclean	4	1.7%	1	1.0%	6	5.5%	0	0.0%	0	0.0%
Street	2	0.8%	1	1.0%	1	0.9%	0	0.0%	0	0.0%
Climate	3	1.3%	1	1.0%	1	0.9%	0	0.0%	0	0.0%
Security	3	1.3%	0	0.0%	2	1.8%	0	0.0%	0	0.0%
Signs for foreigners	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Poverty	4	1.7%	2	2.0%	6	5.5%	0	0.0%	0	0.0%
No respect for rules	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Transportation	3	1.3%	0	0.0%	10	9.1%	0	0.0%	0	0.0%
Lack of hospitality	0	0.0%	1	1.0%	1	0.9%	0	0.0%	1	25.0%
Indecency	0	0.0%	1	1.0%	0	0.0%	0	0.0%	0	0.0%
Crime	0	0.0%	1	1.0%	2	1.8%	0	0.0%	0	0.0%
Language barrier	4	1.7%	0	0.0%	2	1.8%	0	0.0%	0	0.0%
Corruption	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Beggar	2	0.8%	1	1.0%	1	0.9%	0	0.0%	0	0.0%
Telephose service	2	0.8%	1	1.0%	0	0.0%	0	0.0%	0	0.0%
Public services	1	0.4%	0	0.0%	1	0.9%	0	0.0%	0	0.0%
Tourist services	22	9.2%	1	1.0%	5	4.5%	0	0.0%	0	0.0%
Food	14	5.8%	4	4.0%	5	4.5%	0	0.0%	0	0.0%
Street vendors	22	9.2%	5	5.0%	2	1.8%	0	0.0%	1	25.0%
Fading Mexican culture	0	0.0%	0	0.0%	1	0.9%	0	0.0%	0	0.0%
Bureaucratic officers	0	0.0%	2	2.0%	0	0.0%	0	0.0%	0	0.0%
Poor public services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taxi	2	0.8%	3	3.0%	2	1.8%	0	0.0%	0	0.0%
Public transportation	2	0.8%	3	3.0%	2	1.8%	0	0.0%	0	0.0%
Police	2	0.8%	5	5.0%	0	0.0%	0	0.0%	0	0.0%
Political problems	1	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Not punctual	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Lack of promotion	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taboos	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Machismo	0	0.0%	0	0.0%	1	0.9%	0	0.0%	0	0.0%
American influence	2	0.8%	0	0.0%	2	1.8%	1	4.8%	0	0.0%
Airport	116	48.3%	59	58.4%	42	38.2%	13	61.9%	1	25.0%
Too many foreigner	0	0.0%	0	0.0%	1	0.9%	0	0.0%	0	0.0%
25. Male/female										
Male	130	54.2%	47	46.5%	60	54.5%	15	71.4%	1	25.0%
Female	110	45.8%	54	53.5%	50	45.5%	6	28.6%	3	75.0%
26. Age										
15-19	4	1.7%	1	1.0%	0	0.0%	0	0.0%	0	0.0%
20-24	24	10.0%	10	9.9%	4	3.6%	1	4.8%	2	50.0%
25-29	44	18.3%	20	19.8%	9	8.2%	8	38.1%	0	0.0%
30-34	29	12.1%	13	12.9%	11	10.0%	5	23.8%	1	25.0%
35-39	28	11.7%	14	13.9%	9	8.2%	2	9.5%	1	25.0%
40-44	29	12.1%	12	11.9%	9	8.2%	1	4.8%	0	0.0%
45-49	24	10.0%	13	12.9%	11	10.0%	1	4.8%	0	0.0%
50-54	20	8.3%	8	7.9%	9	8.2%	1	4.8%	0	0.0%
55-59	18	7.5%	4	4.0%	14	12.7%	0	0.0%	0	0.0%
60-64	8	3.3%	2	2.0%	17	15.5%	1	4.8%	0	0.0%
65-	12	5.0%	4	4.0%	17	15.5%	1	4.8%	0	0.0%

Source: JICA study team

Table A.1.5 Results of airport survey by regional market segment (Package)-9

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	240 100.0%	101 100.0%	110 100.0%	21 100.0%	4 100.0%
27. Marital status					
Single	75 31.3%	26 25.7%	31 28.2%	5 23.8%	3 75.0%
Married	158 65.8%	69 68.3%	68 61.8%	16 76.2%	1 25.0%
Others	7 2.9%	6 5.9%	11 10.0%	0 0.0%	0 0.0%
29. Occupation					
Management	32 13.3%	11 10.9%	14 12.7%	2 9.5%	0 0.0%
Sales/marketing	21 8.8%	11 10.9%	9 8.2%	1 4.8%	0 0.0%
Government/military	7 2.9%	7 6.9%	4 3.6%	2 9.5%	0 0.0%
Professional	63 26.3%	35 34.7%	12 10.9%	3 14.3%	1 25.0%
Teacher	7 2.9%	7 6.9%	3 2.7%	0 0.0%	1 25.0%
Self-employed	30 12.5%	8 7.9%	2 1.8%	1 4.8%	0 0.0%
Employees	37 15.4%	8 7.9%	19 17.3%	9 42.9%	1 25.0%
Student	10 4.2%	4 4.0%	1 0.9%	0 0.0%	1 25.0%
Housewife	12 5.0%	8 7.9%	10 9.1%	1 4.8%	0 0.0%
Retired	19 7.9%	2 2.0%	35 31.8%	1 4.8%	0 0.0%
Others	2 0.8%	0 0.0%	1 0.9%	1 4.8%	0 0.0%

Source: JICA study team

Table A.1.6 Results of airport survey by regional market segment (Non-Package)-1

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
1. Total nights spent					
1-5 nights	150 31.7%	35 34.0%	11 4.0%	2 8.3%	8 33.3%
6-10 nights	231 48.8%	52 50.5%	43 15.8%	7 29.2%	10 41.7%
11-15 nights	60 12.7%	6 5.8%	68 24.9%	2 8.3%	1 4.2%
16-20	12 2.5%	3 2.9%	39 14.3%	3 12.5%	0 0.0%
21-25	7 1.5%	3 2.9%	43 15.8%	4 16.7%	0 0.0%
26-30	2 0.4%	3 2.9%	33 12.1%	2 8.3%	4 16.7%
More than 1 month	9 1.9%	1 1.0%	31 11.4%	3 12.5%	1 4.2%
Average	9.1	8.5	26.4	37.1	12.2
2. Nights spent in Mex					
1-5 nights	153 32.3%	36 35.0%	21 7.7%	8 33.3%	9 37.5%
6-10	233 49.3%	56 54.4%	49 17.9%	7 29.2%	9 37.5%
11-15	56 11.8%	4 3.9%	70 25.6%	2 8.3%	1 4.2%
16-20	12 2.5%	4 3.9%	38 13.9%	2 8.3%	0 0.0%
21-25	6 1.3%	1 1.0%	37 13.6%	0 0.0%	0 0.0%
25-30	2 0.4%	2 1.9%	35 12.8%	2 8.3%	4 16.7%
30-	10 2.1%	0 0.0%	40 14.7%	4 16.7%	2 8.3%
Average	9	7.3	19.5	15	12
3. Combined countries					
Combined	6 1.3%	8 7.8%	49 17.9%	15 62.5%	1 4.2%
Not combined	467 98.7%	95 92.2%	224 82.1%	9 37.5%	23 95.8%
4. Combined countries					
Canada	1 0.2%	0 0.0%	0 0.0%	1 4.2%	0 0.0%
USA	2 0.4%	5 4.9%	13 4.8%	5 20.8%	1 4.2%
Guatemala	1 0.2%	2 1.9%	24 8.8%	5 20.8%	0 0.0%
Belize	0 0.0%	0 0.0%	5 1.8%	0 0.0%	0 0.0%
El Salvador	0 0.0%	1 1.0%	2 0.7%	2 8.3%	0 0.0%
Honduras	0 0.0%	0 0.0%	6 2.2%	1 4.2%	0 0.0%
Other C.A.	0 0.0%	1 1.0%	1 0.4%	0 0.0%	0 0.0%
South America	1 0.2%	2 1.9%	2 0.7%	1 4.2%	0 0.0%
Caribbean	2 0.4%	0 0.0%	5 1.8%	0 0.0%	0 0.0%
Others	1 0.2%	1 1.0%	3 1.1%	1 4.2%	0 0.0%
6. Accommodation type					
Hotel	339 71.7%	87 84.5%	237 86.8%	24 100.0%	14 58.3%
Friend's & relative's	58 12.3%	16 15.5%	54 19.8%	3 12.5%	12 50.0%
Trailor park	0 0.0%	0 0.0%	1 0.4%	0 0.0%	0 0.0%
Camp site	5 1.1%	0 0.0%	9 3.3%	1 4.2%	0 0.0%
Villa & condo	93 19.7%	4 3.9%	13 4.8%	0 0.0%	0 0.0%
Other accommodation	16 3.4%	2 1.9%	6 2.2%	0 0.0%	0 0.0%
06a. Average nights					
Hotel (tourist nights)	6.8 1.4%	6.5 6.3%	17.3 6.3%	12.4 51.7%	7.9 32.9%
Friend's & relative's (nights)	13.1 2.8%	8.8 8.5%	14.8 5.4%	14.3 59.6%	14.8 61.7%
Trailor park	0 0.0%	0 0.0%	20 7.3%	0 0.0%	0 0.0%
Campsite	11.6 2.5%	0 0.0%	14.8 5.4%	20 83.3%	0 0.0%
Villa & condo	8.6 1.8%	7.2 7.0%	11.9 4.4%	0 0.0%	0 0.0%
Other accommodation	19.3 4.1%	8 7.8%	17.5 6.4%	0 0.0%	0 0.0%

Source: JICA study team

Table A.1. 6 Results of airport survey by regional market segment (Non-Package)-2

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
5. Visited destination					
Aguascalientes	2 0.4%	0 0.0%	1 0.4%	0 0.0%	1 4.2%
Baja California	1 0.2%	0 0.0%	0 0.0%	1 4.2%	0 0.0%
Los Cabos	43 9.1%	0 0.0%	5 1.8%	2 8.3%	1 4.2%
Rest of BCS	4 0.8%	0 0.0%	1 0.4%	0 0.0%	0 0.0%
Campeche	1 0.2%	0 0.0%	9 3.3%	1 4.2%	0 0.0%
Coahuila	1 0.2%	0 0.0%	2 0.7%	0 0.0%	0 0.0%
Colima	1 0.2%	0 0.0%	4 1.5%	1 4.2%	0 0.0%
San Cristobal	4 0.8%	0 0.0%	30 11.0%	3 12.5%	0 0.0%
Rest of Chiapas	5 1.1%	0 0.0%	36 13.2%	2 8.3%	1 4.2%
Chihuahua	0 0.0%	1 1.0%	2 0.7%	0 0.0%	0 0.0%
DF	104 22.0%	70 68.0%	156 57.1%	14 58.3%	13 54.2%
Durango	1 0.2%	0 0.0%	1 0.4%	0 0.0%	0 0.0%
Mexico	7 1.5%	4 3.9%	7 2.6%	0 0.0%	3 12.5%
Guanajuato	11 2.3%	3 2.9%	15 5.5%	2 8.3%	1 4.2%
Acapulco	34 7.2%	10 9.7%	47 17.2%	3 12.5%	0 0.0%
Ixtapa	31 6.6%	0 0.0%	10 3.7%	0 0.0%	0 0.0%
Taxco	13 2.7%	6 5.8%	7 2.6%	2 8.3%	0 0.0%
Guerrero rde	0 0.0%	0 0.0%	3 1.1%	0 0.0%	0 0.0%
Hidalgo	0 0.0%	0 0.0%	1 0.4%	0 0.0%	1 4.2%
Puerto Vallarta	92 19.5%	3 2.9%	18 6.6%	1 4.2%	2 8.3%
Rest of Jalisco	17 3.6%	4 3.9%	18 6.6%	2 8.3%	3 12.5%
Michoacan	5 1.1%	1 1.0%	9 3.3%	1 4.2%	1 4.2%
Morelos	14 3.0%	7 6.8%	10 3.7%	0 0.0%	0 0.0%
Nayarit	2 0.4%	0 0.0%	1 0.4%	0 0.0%	0 0.0%
Nuevo Leon	0 0.0%	2 1.9%	1 0.4%	0 0.0%	0 0.0%
Oaxaca	24 5.1%	0 0.0%	50 18.3%	3 12.5%	1 4.2%
Huatulco	3 0.6%	0 0.0%	5 1.8%	1 4.2%	0 0.0%
Rest of Oaxaca	8 1.7%	0 0.0%	34 12.5%	2 8.3%	0 0.0%
Puebla	3 0.6%	2 1.9%	19 7.0%	1 4.2%	0 0.0%
Queretaro	4 0.8%	2 1.9%	2 0.7%	0 0.0%	0 0.0%
Cancon	108 22.8%	26 25.2%	82 30.0%	4 16.7%	4 16.7%
Cozumel	2 0.4%	1 1.0%	7 2.6%	0 0.0%	0 0.0%
Q.Roo rde	11 2.3%	1 1.0%	43 15.8%	2 8.3%	0 0.0%
San Luis Potosi	0 0.0%	0 0.0%	7 2.6%	0 0.0%	0 0.0%
Sinaloa	15 3.2%	0 0.0%	6 2.2%	1 4.2%	0 0.0%
Sonora	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tabasco	4 0.8%	0 0.0%	14 5.1%	0 0.0%	0 0.0%
Tamaulipas	2 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tlaxcala	0 0.0%	1 1.0%	2 0.7%	0 0.0%	0 0.0%
Veracruz	3 0.6%	1 1.0%	20 7.3%	3 12.5%	0 0.0%
Merida	4 0.8%	1 1.0%	47 17.2%	4 16.7%	2 8.3%
Rest of Yucatan	4 0.8%	0 0.0%	22 8.1%	0 0.0%	0 0.0%
Zacatecas	1 0.2%	0 0.0%	3 1.1%	1 4.2%	0 0.0%
NA	1 0.2%	0 0.0%	8 2.9%	3 12.5%	0 0.0%

Source: JICA study team

Table A.1. 6 Results of airport survey by regional market segment (Non-Package)-3

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	473	100.0%	103	100.0%	273	100.0%	24	100.0%	24	100.0%
05a. Destination (nights)										
Acapulco	5	1.1%	3.6	3.5%	7.2	2.6%	4.3	17.9%	0	0.0%
Aguascalientes	2	0.4%	0	0.0%	2	0.7%	0	0.0%	7	29.2%
Baja California	2	0.4%	0	0.0%	0	0.0%	1	4.2%	0	0.0%
Campeche	4	0.8%	0	0.0%	6.2	2.3%	2	8.3%	0	0.0%
Cancun	7.2	1.5%	6.5	6.3%	7.7	2.8%	7	29.2%	6.8	28.3%
Chihuahua	0	0.0%	3	2.9%	6	2.2%	0	0.0%	0	0.0%
Coahuila	3	0.6%	0	0.0%	26	9.5%	0	0.0%	0	0.0%
Colima	17	3.6%	0	0.0%	5.5	2.0%	3	12.5%	0	0.0%
Cozumel	10.5	2.2%	3	2.9%	5.3	1.9%	0	0.0%	0	0.0%
DF	4.4	0.9%	5.9	5.7%	6.8	2.5%	4.2	17.5%	6.3	26.3%
Durango	3	0.6%	0	0.0%	6	2.2%	0	0.0%	0	0.0%
Guanajuato	10.4	2.2%	4.3	4.2%	5.1	1.9%	3.5	14.6%	12	50.0%
Hidalgo	0	0.0%	0	0.0%	1	0.4%	0	0.0%	30	125.0%
Huatulco	5.7	1.2%	0	0.0%	4.8	1.8%	3	12.5%	0	0.0%
Ixtapa	8	1.7%	0	0.0%	9.7	3.6%	0	0.0%	0	0.0%
Los Cabos	8.7	1.8%	0	0.0%	7.6	2.8%	4	16.7%	4	16.7%
Merida	5	1.1%	2	1.9%	7	2.6%	3.5	14.6%	8	33.3%
Mexico	9.4	2.0%	1.8	1.7%	5.4	2.0%	0	0.0%	13.7	57.1%
Michoacan	6.8	1.4%	1	1.0%	6.6	2.4%	6	25.0%	4.5	18.8%
Morelos	9.4	2.0%	3	2.9%	10.7	3.9%	0	0.0%	0	0.0%
Nayarit	11.5	2.4%	0	0.0%	4	1.5%	0	0.0%	0	0.0%
Nuevo Leon	0	0.0%	6	5.8%	5	1.8%	0	0.0%	0	0.0%
Oaxaca	7.3	1.5%	0	0.0%	6.1	2.2%	7	29.2%	4	16.7%
Puebla	2	0.4%	1	1.0%	4.6	1.7%	12	50.0%	0	0.0%
Puerto Vallarta	8.2	1.7%	3	2.9%	9.1	3.3%	3	12.5%	3	12.5%
Queretaro	3	0.6%	4	3.9%	6.5	2.4%	0	0.0%	0	0.0%
Rest of BCS	5.5	1.2%	0	0.0%	5	1.8%	0	0.0%	0	0.0%
Rest of Chiapas	7.6	1.6%	0	0.0%	4.4	1.6%	2.5	10.4%	6	25.0%
Rest of Guerrero	0	0.0%	0	0.0%	7.3	2.7%	0	0.0%	0	0.0%
Rest of Jalisco	4.7	1.0%	4	3.9%	9.7	3.6%	5.5	22.9%	14.7	61.3%
Rest of Oaxaca	9.8	2.1%	0	0.0%	8.3	3.0%	9.5	39.6%	0	0.0%
Rest of Q.Roo	21.4	4.5%	2	1.9%	7.5	2.7%	4	16.7%	0	0.0%
Rest of Yucatan	5.5	1.2%	0	0.0%	5.5	2.0%	0	0.0%	0	0.0%
San Cristobal	2	0.4%	0	0.0%	4.6	1.7%	6	25.0%	0	0.0%
San Luis Potosi	0	0.0%	0	0.0%	3.4	1.2%	0	0.0%	0	0.0%
Sinaloa	7.3	1.5%	10	9.7%	9.2	3.4%	7	29.2%	0	0.0%
Sonora	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tabasco	6.5	1.4%	0	0.0%	3.9	1.4%	0	0.0%	0	0.0%
Tamaulipas	5.5	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taxco	6.2	1.3%	1.8	1.7%	3.1	1.1%	1.5	6.3%	0	0.0%
Tlaxcala	0	0.0%	4	3.9%	3.5	1.3%	0	0.0%	0	0.0%
Veracruz	22.3	4.7%	1	1.0%	5	1.8%	8.8	36.7%	0	0.0%
Zacatecas	4	0.8%	0	0.0%	4	1.5%	5	20.8%	0	0.0%
NA	1	0.2%	0	0.0%	28.5	10.4%	23.3	97.1%	0	0.0%
07. Traveler type										
Holiday	473	100.0%	103	100.0%	273	100.0%	24	100.0%	24	100.0%
VFR	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Incentive	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Convention	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Business	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Others	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1.6 Results of airport survey by regional market segment (Non-Package)-4

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
8. Holiday purpose					
Beach	272 57.5%	22 21.4%	70 25.6%	5 20.8%	6 25.0%
Nature/wildlife	19 4.0%	6 5.8%	28 10.3%	1 4.2%	1 4.2%
Archaeological sites	39 8.2%	25 24.3%	82 30.0%	10 41.7%	6 25.0%
Colonial cities	50 10.6%	27 26.2%	39 14.3%	2 8.3%	1 4.2%
Indigenous culture/people	26 5.5%	6 5.8%	32 11.7%	2 8.3%	0 0.0%
Sports activities	28 5.9%	2 1.9%	2 0.7%	1 4.2%	1 4.2%
Entertainments	14 3.0%	2 1.9%	5 1.8%	0 0.0%	5 20.8%
Gourmet	6 1.3%	2 1.9%	1 0.4%	2 8.3%	0 0.0%
Shopping	5 1.1%	9 8.7%	1 0.4%	0 0.0%	3 12.5%
Others	14 3.0%	2 1.9%	13 4.8%	1 4.2%	1 4.2%
09. Travel companion					
Alone	92 19.5%	27 26.2%	77 28.2%	10 41.7%	11 45.8%
Spouse	173 36.6%	25 24.3%	70 25.6%	4 16.7%	3 12.5%
Family	80 16.9%	24 23.3%	29 10.6%	1 4.2%	5 20.8%
Friends	105 22.2%	20 19.4%	86 31.5%	8 33.3%	5 20.8%
Business associates	19 4.0%	5 4.9%	7 2.6%	1 4.2%	0 0.0%
Others	3 0.6%	1 1.0%	2 0.7%	0 0.0%	0 0.0%
10. Use of tour package					
Used	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Not used	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
10a. Use of charter flights					
Scheduled flights	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Charter flights	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
10b. Purchase channel					
Travel agency	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Airline	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Others	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
10c. All-inclusive package					
All inclusive	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Partly inclusive	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Others	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
11. Past visits					
Past visits	8 1.7%	3.2 3.1%	1.6 0.6%	0.3 1.3%	9 37.5%
First visit	173 36.6%	55 53.4%	210 76.9%	22 91.7%	1 4.2%
1-3 times	100 21.1%	14 13.6%	29 10.6%	2 8.3%	5 20.8%
3-5 times	92 19.5%	14 13.6%	26 9.5%	0 0.0%	9 37.5%
6 times & above	140 29.6%	21 20.4%	18 6.6%	0 0.0%	11 45.8%
12. Total expenditure					
Less than \$500	10 2.1%	2 1.9%	2 0.7%	0 0.0%	1 4.2%
\$500-1000	91 19.2%	16 15.5%	23 8.4%	0 0.0%	6 25.0%
\$1000-1500	124 26.2%	20 19.4%	25 9.2%	1 4.2%	6 25.0%
\$1500-2000	55 11.6%	12 11.7%	33 12.1%	1 4.2%	1 4.2%
\$2000-2500	18 3.8%	14 13.6%	38 13.9%	0 0.0%	2 8.3%
\$2500-3000	14 3.0%	3 2.9%	10 3.7%	1 4.2%	0 0.0%
\$3000-3500	7 1.5%	0 0.0%	16 5.9%	3 12.5%	3 12.5%
\$3500-4000	1 0.2%	0 0.0%	2 0.7%	0 0.0%	0 0.0%
\$4000 -	4 0.8%	1 1.0%	14 5.1%	9 37.5%	0 0.0%
Expenditure average	1302	1534	2339	4070	1334

Source: JICA study team

Table A.1.6 Results of airport survey by regional market segment (Non-Package)-5

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
13. Expenditure in Mex					
Less than \$500	54 11.4%	10 9.7%	16 5.9%	1 4.2%	3 12.5%
\$500-1000	102 21.6%	14 13.6%	43 15.8%	4 16.7%	6 25.0%
\$1000-1500	61 12.9%	13 12.6%	30 11.0%	5 20.8%	3 12.5%
\$1500-2000	31 6.6%	12 11.7%	20 7.3%	2 8.3%	1 4.2%
\$2000-2500	10 2.1%	6 5.8%	18 6.6%	2 8.3%	2 8.3%
\$2500-3000	10 2.1%	3 2.9%	8 2.9%	0 0.0%	1 4.2%
\$3000-3500	7 1.5%	2 1.9%	13 4.8%	3 12.5%	0 0.0%
\$3500-4000	1 0.2%	2 1.9%	5 1.8%	0 0.0%	0 0.0%
\$4000-	3 0.6%	3 2.9%	16 5.9%	2 8.3%	0 0.0%
Expenditure average	1083	1480	1850	1860	1055
14. Shopping expenditure					
Less than \$100	203 42.9%	39 37.9%	134 49.1%	7 29.2%	9 37.5%
\$100-200	140 29.6%	15 14.6%	55 20.1%	5 20.8%	2 8.3%
\$200-300	62 13.1%	9 8.7%	23 8.4%	4 16.7%	6 25.0%
\$300-400	30 6.3%	7 6.8%	20 7.3%	1 4.2%	1 4.2%
\$400-500	14 3.0%	2 1.9%	15 5.5%	3 12.5%	1 4.2%
\$500-	24 5.1%	31 30.1%	26 9.5%	4 16.7%	5 20.8%
Shopping average	159	347	174	234	326
12a. Accompanying kids					
Yes	33 7.0%	9 8.7%	8 2.9%	1 4.2%	2 8.3%
No	440 93.0%	94 91.3%	265 97.1%	23 95.8%	22 91.7%
Average	1.8	1.7	1.2	2	1.5
12b. Total number of adults					
Average group size	1.9 0.4%	1.8 1.7%	1.7 0.6%	1.9 7.9%	1.4 5.8%
15. Improvement score					
Security	1.4 0.3%	2 1.9%	1.9 0.7%	1.5 6.3%	2.8 11.7%
Vender	1.8 0.4%	1.9 1.8%	1.7 0.6%	1.8 7.5%	2.7 11.3%
Hygiene	1.8 0.4%	2 1.9%	2.1 0.8%	2 8.3%	2.7 11.3%
Contact w/locals	1.3 0.3%	1.4 1.4%	1.4 0.5%	1.6 6.7%	1.3 5.4%
Hotel service	1.2 0.3%	1.3 1.3%	1.4 0.5%	1.6 6.7%	1.3 5.4%
Contact w/locals	1.3 0.3%	1.4 1.4%	1.4 0.5%	1.6 6.7%	1.3 5.4%
Hotel services	1.2 0.3%	1.3 1.3%	1.4 0.5%	1.6 6.7%	1.3 5.4%
Hotel facility	1.2 0.3%	1.2 1.2%	1.4 0.5%	1.8 7.5%	1.4 5.8%
Shopping attraction	1.3 0.3%	1.2 1.2%	1.3 0.5%	1.6 6.7%	1.1 4.6%
Environ. protection	2.4 0.5%	2.9 2.8%	3 1.1%	2.4 10.0%	3.1 12.9%
Tourist info	1.6 0.3%	1.9 1.8%	2 0.7%	2 8.3%	2.4 10.0%
Tour guide	1.4 0.3%	1.5 1.5%	1.7 0.6%	1.8 7.5%	1.8 7.5%
Public transportation	1.7 0.4%	1.6 1.6%	2 0.7%	2.3 9.6%	1.7 7.1%
Signs for foreigners	1.3 0.3%	1.4 1.4%	1.6 0.6%	2 8.3%	1.7 7.1%
16. Resort type					
Urbanized resort	146 30.9%	29 28.2%	45 16.5%	2 8.3%	6 25.0%
Village type resort	243 51.4%	30 29.1%	135 49.5%	15 62.5%	8 33.3%
Enclave type resort	71 15.0%	39 37.9%	79 28.9%	7 29.2%	9 37.5%

Source: JICA study team

Table A.1. 6 Results of airport survey by regional market segment (Non-Package)-6

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
17. Competitor					
Canada	4 0.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
USA	50 10.6%	15 14.6%	7 2.6%	1 4.2%	1 4.2%
Guatemala	1 0.2%	0 0.0%	3 1.1%	0 0.0%	0 0.0%
Belize	2 0.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Honduras	1 0.2%	0 0.0%	1 0.4%	2 8.3%	0 0.0%
Cuba	1 0.2%	3 2.9%	3 1.1%	0 0.0%	2 8.3%
Europe	9 1.9%	0 0.0%	1 0.4%	1 4.2%	0 0.0%
Caribbean	20 4.2%	6 5.8%	5 1.8%	0 0.0%	3 12.5%
Central America	15 3.2%	2 1.9%	6 2.2%	2 8.3%	0 0.0%
South America	9 1.9%	5 4.9%	13 4.8%	1 4.2%	0 0.0%
Africa	0 0.0%	0 0.0%	9 3.3%	0 0.0%	0 0.0%
Asia	4 0.8%	1 1.0%	11 4.0%	0 0.0%	0 0.0%
Oceania	11 2.3%	0 0.0%	5 1.8%	0 0.0%	0 0.0%
Unspecified	4 0.8%	1 1.0%	3 1.1%	1 4.2%	1 4.2%
18. Mex's strength					
Price	71 15.0%	20 19.4%	32 11.7%	3 12.5%	1 4.2%
Travel time	18 3.8%	4 3.9%	1 0.4%	0 0.0%	3 12.5%
Security	1 0.2%	0 0.0%	0 0.0%	1 4.2%	0 0.0%
Climate	110 23.3%	7 6.8%	45 16.5%	4 16.7%	2 8.3%
Beach	79 16.7%	13 12.6%	31 11.4%	1 4.2%	1 4.2%
Tourism attractions	60 12.7%	28 27.2%	70 25.6%	8 33.3%	4 16.7%
Tourism services	8 1.7%	4 3.9%	3 1.1%	1 4.2%	0 0.0%
Shopping	2 0.4%	10 9.7%	2 0.7%	0 0.0%	2 8.3%
Friendly people	49 10.4%	11 10.7%	38 13.9%	1 4.2%	8 33.3%
Relaxing atmosphere	44 9.3%	4 3.9%	26 9.5%	5 20.8%	0 0.0%
Others	31 6.6%	2 1.9%	24 8.8%	0 0.0%	3 12.5%
19. Influence					
Agent	111 23.5%	30 29.1%	71 26.0%	2 8.3%	2 8.3%
Brochure	48 10.1%	14 13.6%	36 13.2%	5 20.8%	1 4.2%
Advertise	28 5.9%	8 7.8%	23 8.4%	3 12.5%	0 0.0%
TV program	14 3.0%	13 12.6%	12 4.4%	1 4.2%	3 12.5%
Article	26 5.5%	6 5.8%	24 8.8%	6 25.0%	0 0.0%
Friends	255 53.9%	62 60.2%	115 42.1%	8 33.3%	17 70.8%
SECTUR	5 1.1%	4 3.9%	11 4.0%	1 4.2%	2 8.3%
Others	63 13.3%	8 7.8%	55 20.1%	4 16.7%	4 16.7%
20. Recommend Mex					
Recommend	468 98.9%	103 100.0%	269 98.5%	24 100.0%	24 100.0%
Not recommend	5 1.1%	0 0.0%	4 1.5%	0 0.0%	0 0.0%
21. Want to revisit					
Yes	461 97.5%	103 100.0%	252 92.3%	20 83.3%	24 100.0%
No	12 2.5%	0 0.0%	21 7.7%	4 16.7%	0 0.0%

Source: JICA study team

Table A.1.6 Results of airport survey by regional market segment (Non-Package)-7

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	473	100.0%	103	100.0%	273	100.0%	24	100.0%	24	100.0%
22. Destination for revisit										
Aguascalientes	12	2.5%	1	1.0%	14	5.1%	0	0.0%	1	4.2%
Baja California	15	3.2%	3	2.9%	19	7.0%	2	8.3%	0	0.0%
Los Cabos	43	9.1%	1	1.0%	6	2.2%	2	8.3%	1	4.2%
Rest of BCS	22	4.7%	8	7.8%	40	14.7%	0	0.0%	3	12.5%
Campeche	2	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Coahuila	0	0.0%	0	0.0%	2	0.7%	0	0.0%	0	0.0%
Colima	11	2.3%	6	5.8%	1	0.4%	0	0.0%	0	0.0%
San Cristobal	6	1.3%	1	1.0%	17	6.2%	0	0.0%	0	0.0%
Rest of Chiapas	13	2.7%	2	1.9%	27	9.9%	2	8.3%	0	0.0%
Chihuahua	3	0.6%	1	1.0%	4	1.5%	1	4.2%	0	0.0%
DF	46	9.7%	15	14.6%	31	11.4%	3	12.5%	6	25.0%
Durango	0	0.0%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Mexico	2	0.4%	0	0.0%	2	0.7%	1	4.2%	0	0.0%
Guanajuato	9	1.9%	7	6.8%	7	2.6%	0	0.0%	2	8.3%
Acapulco	65	13.7%	38	36.9%	19	7.0%	1	4.2%	6	25.0%
Ixtapa	36	7.6%	3	2.9%	4	1.5%	0	0.0%	1	4.2%
Taxco	6	1.3%	4	3.9%	8	2.9%	2	8.3%	0	0.0%
Rest of Guerrero	1	0.2%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Hidalgo	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Puerto Vallarta	104	22.0%	13	12.6%	12	4.4%	0	0.0%	1	4.2%
Rest of Jalisco	34	7.2%	11	10.7%	13	4.8%	2	8.3%	0	0.0%
Morelia	3	0.6%	1	1.0%	2	0.7%	0	0.0%	0	0.0%
Morelos	8	1.7%	1	1.0%	7	2.6%	0	0.0%	3	12.5%
Nayarit	2	0.4%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Nuevo Leon	5	1.1%	6	5.8%	3	1.1%	0	0.0%	0	0.0%
Oaxaca	24	5.1%	2	1.9%	16	5.9%	1	4.2%	4	16.7%
Huatulco	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Oaxaca	12	2.5%	2	1.9%	19	7.0%	1	4.2%	3	12.5%
Puebla	4	0.8%	2	1.9%	12	4.4%	0	0.0%	0	0.0%
Queretaro	2	0.4%	1	1.0%	0	0.0%	1	4.2%	0	0.0%
Cancun	131	27.7%	35	34.0%	21	7.7%	2	8.3%	7	29.2%
Cozumel	28	5.9%	1	1.0%	2	0.7%	0	0.0%	1	4.2%
Rest of Q.Roo	8	1.7%	3	2.9%	11	4.0%	0	0.0%	0	0.0%
San Luis Potosi	0	0.0%	0	0.0%	3	1.1%	0	0.0%	0	0.0%
Sinaloa	20	4.2%	0	0.0%	4	1.5%	0	0.0%	0	0.0%
Sonora	4	0.8%	1	1.0%	3	1.1%	0	0.0%	0	0.0%
Tabasco	1	0.2%	0	0.0%	2	0.7%	0	0.0%	0	0.0%
Tamaulipas	1	0.2%	0	0.0%	0	0.0%	0	0.0%	1	4.2%
Tlaxcala	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Veracruz	11	2.3%	2	1.9%	11	4.0%	0	0.0%	1	4.2%
Merida	31	6.6%	2	1.9%	20	7.3%	1	4.2%	0	0.0%
Rest of Yucatan	17	3.6%	5	4.9%	18	6.6%	3	12.5%	1	4.2%
Zacatecas	3	0.6%	1	1.0%	3	1.1%	0	0.0%	0	0.0%
NA	31	6.6%	8	7.8%	58	21.2%	5	20.8%	2	8.3%

Source: JICA study team

Table A.1.6 Results of airport survey by regional market segment (Non-Package)-8

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	473	100.0%	103	100.0%	273	100.0%	24	100.0%	24	100.0%
24. Problems										
Pollution	21	4.4%	19	18.4%	32	11.7%	3	12.5%	3	12.5%
Traffic	6	1.3%	2	1.9%	5	1.8%	1	4.2%	1	4.2%
Overcrowdedness	1	0.2%	1	1.0%	1	0.4%	0	0.0%	0	0.0%
Unclean	14	3.0%	0	0.0%	8	2.9%	2	8.3%	1	4.2%
Street	5	1.1%	1	1.0%	1	0.4%	0	0.0%	0	0.0%
Climate	3	0.6%	2	1.9%	1	0.4%	0	0.0%	1	4.2%
Security	5	1.1%	3	2.9%	13	4.8%	1	4.2%	1	4.2%
Signs for foreigners	1	0.2%	0	0.0%	4	1.5%	0	0.0%	0	0.0%
Poverty	11	2.3%	3	2.9%	14	5.1%	0	0.0%	0	0.0%
No respect for rules	2	0.4%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Transportation	6	1.3%	0	0.0%	2	0.7%	0	0.0%	0	0.0%
Lack of hospitality	3	0.6%	0	0.0%	3	1.1%	1	4.2%	0	0.0%
Indecency	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Crime	0	0.0%	1	1.0%	4	1.5%	0	0.0%	0	0.0%
Language barrier	9	1.9%	0	0.0%	2	0.7%	1	4.2%	0	0.0%
Corruption	1	0.2%	0	0.0%	5	1.8%	0	0.0%	0	0.0%
Beggar	0	0.0%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Telephose service	3	0.6%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Public services	6	1.3%	2	1.9%	2	0.7%	0	0.0%	0	0.0%
Tourist services	24	5.1%	3	2.9%	6	2.2%	1	4.2%	0	0.0%
Food	18	3.8%	5	4.9%	14	5.1%	1	4.2%	0	0.0%
Street vendors	29	6.1%	3	2.9%	8	2.9%	0	0.0%	0	0.0%
Fading Mexican culture	1	0.2%	2	1.9%	5	1.8%	0	0.0%	0	0.0%
Bureaucratic officers	1	0.2%	1	1.0%	2	0.7%	1	4.2%	0	0.0%
Poor public services	1	0.2%	1	1.0%	1	0.4%	0	0.0%	1	4.2%
Taxi	12	2.5%	3	2.9%	2	0.7%	0	0.0%	0	0.0%
Public transportation	12	2.5%	3	2.9%	2	0.7%	0	0.0%	0	0.0%
Police	6	1.3%	0	0.0%	6	2.2%	1	4.2%	0	0.0%
Political problems	3	0.6%	0	0.0%	5	1.8%	1	4.2%	2	8.3%
Not punctual	0	0.0%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Lack of promotion	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taboos	0	0.0%	0	0.0%	1	0.4%	0	0.0%	0	0.0%
Machismo	0	0.0%	0	0.0%	2	0.7%	0	0.0%	0	0.0%
American influence	1	0.2%	0	0.0%	9	3.3%	0	0.0%	0	0.0%
Airport	215	45.5%	41	39.8%	83	30.4%	5	20.8%	11	45.8%
Too many foreigner	1	0.2%	0	0.0%	9	3.3%	0	0.0%	0	0.0%
25. Male/female										
Male	246	52.0%	47	45.6%	147	53.8%	15	62.5%	13	54.2%
Female	227	48.0%	56	54.4%	126	46.2%	9	37.5%	11	45.8%
26. Age										
15-19	7	1.5%	7	6.8%	2	0.7%	0	0.0%	0	0.0%
20-24	40	8.5%	12	11.7%	35	12.8%	2	8.3%	0	0.0%
25-29	49	10.4%	18	17.5%	63	23.1%	7	29.2%	5	20.8%
30-34	70	14.8%	10	9.7%	51	18.7%	5	20.8%	7	29.2%
35-39	49	10.4%	8	7.8%	34	12.5%	1	4.2%	1	4.2%
40-44	54	11.4%	11	10.7%	16	5.9%	8	33.3%	3	12.5%
45-49	43	9.1%	14	13.6%	20	7.3%	1	4.2%	5	20.8%
50-54	52	11.0%	5	4.9%	21	7.7%	0	0.0%	2	8.3%
55-59	32	6.8%	5	4.9%	9	3.3%	0	0.0%	1	4.2%
60-64	40	8.5%	7	6.8%	11	4.0%	0	0.0%	0	0.0%
65-	37	7.8%	6	5.8%	11	4.0%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1.6 Results of airport survey by regional market segment (Non-Package)-9

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	473 100.0%	103 100.0%	273 100.0%	24 100.0%	24 100.0%
27. Marital status					
Single	162 34.2%	31 30.1%	156 57.1%	16 66.7%	5 20.8%
Married	282 59.6%	64 62.1%	104 38.1%	8 33.3%	18 75.0%
Others	29 6.1%	8 7.8%	13 4.8%	0 0.0%	1 4.2%
29. Occupation					
Management	48 10.1%	8 7.8%	19 7.0%	5 20.8%	1 4.2%
Sales/marketing	52 11.0%	14 13.6%	19 7.0%	1 4.2%	2 8.3%
Government/military	12 2.5%	1 1.0%	14 5.1%	1 4.2%	0 0.0%
Professional	109 23.0%	23 22.3%	79 28.9%	8 33.3%	2 8.3%
Teacher	13 2.7%	3 2.9%	7 2.6%	0 0.0%	1 4.2%
Self-employed	44 9.3%	2 1.9%	24 8.8%	4 16.7%	3 12.5%
Employees	82 17.3%	13 12.6%	71 26.0%	2 8.3%	12 50.0%
Student	19 4.0%	14 13.6%	16 5.9%	0 0.0%	0 0.0%
Housewife	23 4.9%	18 17.5%	4 1.5%	0 0.0%	3 12.5%
Retired	65 13.7%	6 5.8%	15 5.5%	1 4.2%	0 0.0%
Others	6 1.3%	1 1.0%	5 1.8%	2 8.3%	0 0.0%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-1

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
1. Total nights spent					
1-5 nights	45 42.1%	13 39.4%	4 10.8%	0 0.0%	28 36.4%
6-10 nights	37 34.6%	3 9.1%	6 16.2%	1 14.3%	23 29.9%
11-15 nights	15 14.0%	8 24.2%	3 8.1%	3 42.9%	11 14.3%
16-20	2 1.9%	2 6.1%	8 21.6%	1 14.3%	5 6.5%
21-25	1 0.9%	1 3.0%	3 8.1%	0 0.0%	2 2.6%
26-30	3 2.8%	4 12.1%	2 5.4%	0 0.0%	4 5.2%
More than 1 month	3 2.8%	1 3.0%	9 24.3%	2 28.6%	4 5.2%
Average	10.1	22.6	32.8	22.4	11.7
2. Nights spent in Mex					
1-5 nights	45 42.1%	13 39.4%	6 16.2%	2 28.6%	29 37.7%
6-10	37 34.6%	3 9.1%	5 13.5%	1 14.3%	23 29.9%
11-15	15 14.0%	8 24.2%	2 5.4%	2 28.6%	10 13.0%
16-20	2 1.9%	2 6.1%	8 21.6%	1 14.3%	5 6.5%
21-25	1 0.9%	1 3.0%	3 8.1%	0 0.0%	2 2.6%
25-30	3 2.8%	4 12.1%	5 13.5%	0 0.0%	4 5.2%
30+	6 5.6%	3 9.1%	10 27.0%	1 14.3%	6 7.8%
Average	10.1	22.5	32.2	13.6	11.3
3. Combined countries					
Combined	0 0.0%	1 3.0%	2 5.4%	4 57.1%	1 1.3%
Not combined	107 100.0%	32 97.0%	35 94.6%	3 42.9%	76 98.7%
4. Combined countries					
Canada	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
USA	0 0.0%	1 3.0%	1 2.7%	0 0.0%	1 1.3%
Guatemala	0 0.0%	0 0.0%	1 2.7%	2 28.6%	0 0.0%
Belize	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
El Salvador	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Honduras	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%
Other C.A.	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%
South America	0 0.0%	0 0.0%	0 0.0%	2 28.6%	0 0.0%
Caribbean	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%
Others	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%
6. Accommodation type					
Hotel	33 30.8%	8 24.2%	21 56.8%	5 71.4%	18 23.4%
Friend's & relative's	83 77.6%	27 81.8%	30 81.1%	3 42.9%	62 80.5%
Trailer park	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Camp site	0 0.0%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Villa & condo	5 4.7%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Other accommodation	2 1.9%	1 3.0%	0 0.0%	1 14.3%	8 10.4%
06a. Average nights					
Hotel (tourist nights)	4.4 4.1%	8.1 24.5%	9.3 25.1%	8 114.3%	5.1 6.6%
Friend's & relative's (nights)	10.8 10.1%	15 45.5%	32 86.5%	7 100.0%	10.8 14.0%
Trailer park	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 2.6%
Campsite	0 0.0%	0 0.0%	18 48.6%	0 0.0%	0 0.0%
Villa & condo	5.2 4.9%	0 0.0%	19 51.4%	0 0.0%	0 0.0%
Other accommodation	6 5.6%	270 818.2%	0 0.0%	34 485.7%	13.2 17.1%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-2

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	107	100.0%	33	100.0%	37	100.0%	7	100.0%	77	100.0%
5. Visited destination										
Aguascalientes	2	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Baja California	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Los Cabos	0	0.0%	0	0.0%	1	2.7%	0	0.0%	0	0.0%
Rest of BCS	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Campeche	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Coahuila	1	0.9%	0	0.0%	0	0.0%	0	0.0%	1	1.3%
Colima	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
San Cristobal	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Chiapas	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Chihuahua	0	0.0%	0	0.0%	3	8.1%	0	0.0%	0	0.0%
DF	55	51.4%	26	78.8%	27	73.0%	7	100.0%	39	50.6%
Durango	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Mexico	9	8.4%	1	3.0%	1	2.7%	1	14.3%	5	6.5%
Guanajuato	5	4.7%	1	3.0%	4	10.8%	0	0.0%	4	5.2%
Acapulco	4	3.7%	0	0.0%	3	8.1%	0	0.0%	2	2.6%
Ixtapa	2	1.9%	1	3.0%	3	8.1%	0	0.0%	1	1.3%
Taxco	1	0.9%	1	3.0%	2	5.4%	0	0.0%	1	1.3%
Guerrero rde	2	1.9%	0	0.0%	1	2.7%	0	0.0%	6	7.8%
Hidalgo	1	0.9%	0	0.0%	0	0.0%	0	0.0%	3	3.9%
Puerto Vallarta	4	3.7%	0	0.0%	3	8.1%	0	0.0%	1	1.3%
Rest of Jalisco	4	3.7%	4	12.1%	5	13.5%	0	0.0%	4	5.2%
Michoacan	2	1.9%	0	0.0%	3	8.1%	0	0.0%	4	5.2%
Morelos	10	9.3%	1	3.0%	5	13.5%	0	0.0%	11	14.3%
Nayarit	1	0.9%	0	0.0%	2	5.4%	0	0.0%	0	0.0%
Nuevo Leon	1	0.9%	1	3.0%	0	0.0%	0	0.0%	1	1.3%
Oaxaca	5	4.7%	0	0.0%	2	5.4%	0	0.0%	3	3.9%
Huatulco	0	0.0%	0	0.0%	1	2.7%	0	0.0%	0	0.0%
Rest of Oaxaca	1	0.9%	0	0.0%	0	0.0%	0	0.0%	2	2.6%
Puebla	5	4.7%	1	3.0%	3	8.1%	2	28.6%	11	14.3%
Queretaro	3	2.8%	2	6.1%	2	5.4%	0	0.0%	2	2.6%
Cancun	5	4.7%	0	0.0%	1	2.7%	1	14.3%	1	1.3%
Cozumel	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Q.Roo rde	1	0.9%	0	0.0%	1	2.7%	0	0.0%	0	0.0%
San Luis Potosi	6	5.6%	0	0.0%	2	5.4%	0	0.0%	0	0.0%
Sinaloa	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sonora	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tabasco	2	1.9%	0	0.0%	0	0.0%	0	0.0%	1	1.3%
Tamaulipas	2	1.9%	1	3.0%	2	5.4%	0	0.0%	1	1.3%
Tlaxcala	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Veracruz	6	5.6%	0	0.0%	2	5.4%	0	0.0%	6	7.8%
Merida	4	3.7%	0	0.0%	1	2.7%	0	0.0%	0	0.0%
Rest of Yucatan	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Zacatecas	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
NA	0	0.0%	1	3.0%	1	2.7%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-3

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	107	100.0%	33	100.0%	37	100.0%	7	100.0%	77	100.0%
05a. Destination (nights)										
Acapulco	5.2	4.9%	0	0.0%	9	24.3%	0	0.0%	4.5	5.8%
Aguascalientes	3	2.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Baja California	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Campeche	8	7.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Cancun	5.6	5.2%	0	0.0%	11	29.7%	10	142.9%	2	2.6%
Chihuahua	0	0.0%	0	0.0%	5	13.5%	0	0.0%	0	0.0%
Coahuila	120	112.1%	0	0.0%	0	0.0%	0	0.0%	10	13.0%
Colima	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Cozumel	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
DF	6.2	5.8%	22	66.7%	25	67.6%	10.6	151.4%	7.3	9.5%
Durango	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Guanajuato	2.2	2.1%	7	21.2%	4.8	13.0%	0	0.0%	3.2	4.2%
Hidalgo	4	3.7%	0	0.0%	0	0.0%	0	0.0%	3	3.9%
Huatalco	0	0.0%	0	0.0%	3	8.1%	0	0.0%	0	0.0%
Ixtapa	4.5	4.2%	3	9.1%	5.3	14.3%	0	0.0%	5	6.5%
Los Cabos	0	0.0%	0	0.0%	8	21.6%	0	0.0%	0	0.0%
Merida	13	12.1%	0	0.0%	6	16.2%	0	0.0%	0	0.0%
Mexico	5.8	5.4%	11	33.3%	20	54.1%	1	14.3%	12.2	15.8%
Michoacan	11.5	10.7%	0	0.0%	31	83.8%	0	0.0%	9	11.7%
Morelos	9.2	8.6%	4	12.1%	11.2	30.3%	0	0.0%	8.6	11.2%
Nayarit	3	2.8%	0	0.0%	6.5	17.6%	0	0.0%	0	0.0%
Nuevo Leon	50	46.7%	5	15.2%	0	0.0%	0	0.0%	40	51.9%
Oaxaca	4.8	4.5%	0	0.0%	8	21.6%	0	0.0%	7	9.1%
Puebla	4	3.7%	21	63.6%	16	43.2%	5	71.4%	8.5	11.0%
Puerto Vallarta	4.5	4.2%	0	0.0%	4.7	12.7%	0	0.0%	5	6.5%
Queretaro	5.3	5.0%	5	15.2%	13	35.1%	0	0.0%	2	2.6%
Rest of BCS	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Chiapas	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Guerrero	11.5	10.7%	0	0.0%	16	43.2%	0	0.0%	6.7	8.7%
Rest of Jalisco	7.2	6.7%	17.8	53.9%	9.4	25.4%	0	0.0%	7.4	9.6%
Rest of Oaxaca	8	7.5%	0	0.0%	0	0.0%	0	0.0%	20	26.0%
Rest of Q.Roo	30	28.0%	0	0.0%	6	16.2%	0	0.0%	0	0.0%
Rest of Yucatan	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
San Cristobal	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
San Luis Potosi	5	4.7%	0	0.0%	16.5	44.6%	0	0.0%	0	0.0%
Sinaloa	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sonora	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tabasco	5.5	5.1%	0	0.0%	0	0.0%	0	0.0%	15	19.5%
Tamaulipas	8	7.5%	29	87.9%	4	10.8%	0	0.0%	3	3.9%
Taxco	3	2.8%	5	15.2%	1.5	4.1%	0	0.0%	3	3.9%
Tlaxcala	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Veracruz	4.5	4.2%	0	0.0%	4	10.8%	0	0.0%	6	7.8%
Zacatecas	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
NA	0	0.0%	4	12.1%	6	16.2%	0	0.0%	0	0.0%
07. Traveler type										
Holiday	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
VFR	107	100.0%	33	100.0%	37	100.0%	7	100.0%	77	100.0%
Incentive	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Convention	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Business	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Others	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-4

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
8. Holiday purpose					
Beach	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Nature/wildlife	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Archaeological sites	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Colonial cities	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Indigenous culture/people	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Sports activities	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Entertainments	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Gourmet	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Shopping	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Others	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
09. Travel companion					
Alone	56 52.3%	18 54.5%	21 56.8%	6 85.7%	50 64.9%
Spouse	17 15.9%	2 6.1%	8 21.6%	0 0.0%	8 10.4%
Family	19 17.8%	8 24.2%	2 5.4%	1 14.3%	17 22.1%
Friends	14 13.1%	4 12.1%	6 16.2%	0 0.0%	1 1.3%
Business associates	1 0.9%	1 3.0%	0 0.0%	0 0.0%	1 1.3%
Others	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
10. Use of tour package					
Used	2 1.9%	1 3.0%	4 10.8%	1 14.3%	1 1.3%
Not used	105 98.1%	32 97.0%	33 89.2%	6 85.7%	76 98.7%
10a. Use of charter flights					
Scheduled flights	2 1.9%	1 3.0%	3 8.1%	1 14.3%	1 1.3%
Charter flights	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
10b. Purchase channel					
Travel agency	2 1.9%	1 3.0%	3 8.1%	1 14.3%	1 1.3%
Airline	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Others	0 0.0%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
10c. All-inclusive package					
All inclusive	1 0.9%	0 0.0%	1 2.7%	0 0.0%	1 1.3%
Partly inclusive	1 0.9%	1 3.0%	1 2.7%	1 14.3%	0 0.0%
Others	0 0.0%	0 0.0%	2 5.4%	0 0.0%	0 0.0%
11. Past visits					
Past visits	21.5 20.1%	6.6 20.0%	2 5.4%	3.6 51.4%	13.7 17.8%
First visit	27 25.2%	5 15.2%	23 62.2%	2 28.6%	5 6.5%
1-3 times	16 15.0%	15 45.5%	4 10.8%	2 28.6%	13 16.9%
3-5 times	17 15.9%	11 33.3%	6 16.2%	2 28.6%	20 26.0%
6 times & above	47 43.9%	8 24.2%	5 13.5%	1 14.3%	43 55.8%
12. Total expenditure					
Less than \$500	11 10.3%	0 0.0%	1 2.7%	0 0.0%	6 7.8%
\$500-1000	46 43.0%	6 18.2%	2 5.4%	0 0.0%	27 35.1%
\$1000-1500	17 15.9%	8 24.2%	8 21.6%	0 0.0%	18 23.4%
\$1500-2000	13 12.1%	2 6.1%	7 18.9%	0 0.0%	2 2.6%
\$2000-2500	3 2.8%	4 12.1%	4 10.8%	1 14.3%	8 10.4%
\$2500-3000	0 0.0%	0 0.0%	0 0.0%	0 0.0%	4 5.2%
\$3000-3500	4 3.7%	3 9.1%	2 5.4%	0 0.0%	3 3.9%
\$3500-4000	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
\$4000 -	0 0.0%	0 0.0%	1 2.7%	4 57.1%	2 2.6%
Expenditure average	950	1439	1562	5200	1275

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-5

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
13. Expenditure in Mex					
Less than \$500	33 30.8%	2 6.1%	4 10.8%	2 28.6%	21 27.3%
\$500-1000	26 24.3%	9 27.3%	6 16.2%	1 14.3%	17 22.1%
\$1000-1500	9 8.4%	4 12.1%	3 8.1%	0 0.0%	7 9.1%
\$1500-2000	2 1.9%	0 0.0%	2 5.4%	0 0.0%	7 9.1%
\$2000-2500	0 0.0%	3 9.1%	1 2.7%	0 0.0%	2 2.6%
\$2500-3000	1 0.9%	0 0.0%	1 2.7%	0 0.0%	1 1.3%
\$3000-3500	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
\$3500-4000	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
\$4000-	1 0.9%	0 0.0%	0 0.0%	1 14.3%	1 1.3%
Expenditure average	643	961	894	1500	810
14. Shopping expenditure					
Less than \$100	44 41.1%	12 36.4%	16 43.2%	1 14.3%	30 39.0%
\$100-200	26 24.3%	1 3.0%	4 10.8%	1 14.3%	16 20.8%
\$200-300	11 10.3%	9 27.3%	4 10.8%	0 0.0%	14 18.2%
\$300-400	15 14.0%	2 6.1%	5 13.5%	0 0.0%	3 3.9%
\$400-500	1 0.9%	1 3.0%	1 2.7%	1 14.3%	2 2.6%
\$500-	10 9.3%	8 24.2%	7 18.9%	4 57.1%	12 15.6%
Shopping average	167	318	198	1007	228
12a. Accompanying kids					
Yes	6 5.6%	3 9.1%	0 0.0%	1 14.3%	11 14.3%
No	101 94.4%	30 90.9%	37 100.0%	6 85.7%	66 85.7%
Average	1.3	1		3	1.1
12b. Total number of adults					
Average group size	1.4	1.3	1.4	1.1	1.3
15. Improvement score					
Security	2.2 2.1%	2.6 7.9%	2.6 7.0%	2.6 37.1%	2.8 3.6%
Vender	2.2 2.1%	2.3 7.0%	2.1 5.7%	2.5 35.7%	2.4 3.1%
Hygiene	2.6 2.4%	2.4 7.3%	2.5 6.8%	2.7 38.6%	2.7 3.5%
Contact w/locals	1.5 1.4%	1.5 4.5%	1.5 4.1%	1.9 27.1%	1.6 2.1%
Hotel service	1.3 1.2%	1.6 4.8%	1.2 3.2%	1.9 27.1%	1.6 2.1%
Contact w/locals	1.5 1.4%	1.5 4.5%	1.5 4.1%	1.9 27.1%	1.6 2.1%
Hotel services	1.3 1.2%	1.6 4.8%	1.2 3.2%	1.9 27.1%	1.6 2.1%
Hotel facility	1.3 1.2%	1.8 5.5%	1.2 3.2%	1.7 24.3%	1.7 2.2%
Shopping attraction	1.6 1.5%	1.5 4.5%	1.3 3.5%	1.6 22.9%	1.5 1.9%
Environ. protection	3.3 3.1%	3.5 10.6%	3.4 9.2%	2.6 37.1%	3.2 4.2%
Tourist info	2.3 2.1%	1.7 5.2%	1.8 4.9%	2 28.6%	2.5 3.2%
Tour guide	1.9 1.8%	1.7 5.2%	1.3 3.5%	2 28.6%	2.3 3.0%
Public transportation	2.1 2.0%	1.8 5.5%	2.1 5.7%	2.5 35.7%	2.3 3.0%
Signs for foreigners	1.7 1.6%	1.4 4.2%	1.7 4.6%	3 42.9%	1.9 2.5%
16. Resort type					
Urbanized resort	22 20.6%	8 24.2%	7 18.9%	1 14.3%	11 14.3%
Village type resort	50 46.7%	14 42.4%	10 27.0%	0 0.0%	27 35.1%
Enclave type resort	28 26.2%	10 30.3%	15 40.5%	5 71.4%	31 40.3%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-6

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
17. Competitor					
Canada	1 0.9%	0 0.0%	1 2.7%	0 0.0%	2 2.6%
USA	6 5.6%	2 6.1%	0 0.0%	1 14.3%	2 2.6%
Guatemala	0 0.0%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Belize	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Honduras	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Cuba	1 0.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Europe	3 2.8%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Caribbean	2 1.9%	0 0.0%	0 0.0%	0 0.0%	2 2.6%
Central America	0 0.0%	0 0.0%	1 2.7%	0 0.0%	1 1.3%
South America	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 2.6%
Africa	0 0.0%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Asia	1 0.9%	0 0.0%	2 5.4%	0 0.0%	0 0.0%
Oceania	2 1.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unspecified	0 0.0%	0 0.0%	0 0.0%	1 14.3%	1 1.3%
18. Mex's strength					
Price	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Travel time	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Security	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Climate	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Beach	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tourism attractions	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Tourism services	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Shopping	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Friendly people	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Relaxing atmosphere	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Others	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
19. Influence					
Agent	5 4.7%	3 9.1%	3 8.1%	0 0.0%	5 6.5%
Brochure	4 3.7%	0 0.0%	1 2.7%	0 0.0%	5 6.5%
Advertise	0 0.0%	0 0.0%	1 2.7%	0 0.0%	3 3.9%
TV program	4 3.7%	2 6.1%	2 5.4%	0 0.0%	10 13.0%
Article	2 1.9%	1 3.0%	1 2.7%	0 0.0%	1 1.3%
Friends	92 86.0%	24 72.7%	34 91.9%	2 28.6%	45 58.4%
SECTUR	3 2.8%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Others	3 2.8%	5 15.2%	2 5.4%	5 71.4%	20 26.0%
20. Recommend Mex					
Recommend	105 98.1%	32 97.0%	37 100.0%	7 100.0%	77 100.0%
Not recommend	2 1.9%	1 3.0%	0 0.0%	0 0.0%	0 0.0%
21. Want to revisit					
Yes	103 96.3%	33 100.0%	33 89.2%	7 100.0%	76 98.7%
No	4 3.7%	0 0.0%	4 10.8%	0 0.0%	1 1.3%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-7

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
22. Destination for revisit					
Aguascalientes	4 3.7%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Baja California	3 2.8%	1 3.0%	4 10.8%	1 14.3%	7 9.1%
Los Cabos	1 0.9%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Rest of BCS	13 12.1%	2 6.1%	2 5.4%	1 14.3%	11 14.3%
Campeche	0 0.0%	1 3.0%	0 0.0%	0 0.0%	0 0.0%
Coahuila	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Colima	1 0.9%	0 0.0%	1 2.7%	0 0.0%	2 2.6%
San Cristobal	1 0.9%	1 3.0%	1 2.7%	1 14.3%	0 0.0%
Rest of Chiapas	2 1.9%	2 6.1%	11 29.7%	1 14.3%	2 2.6%
Chihuahua	1 0.9%	0 0.0%	1 2.7%	0 0.0%	2 2.6%
DF	11 10.3%	3 9.1%	3 8.1%	0 0.0%	6 7.8%
Durango	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Mexico	1 0.9%	1 3.0%	0 0.0%	0 0.0%	4 5.2%
Guanajuato	4 3.7%	2 6.1%	3 8.1%	0 0.0%	2 2.6%
Acapulco	17 15.9%	10 30.3%	4 10.8%	0 0.0%	17 22.1%
Ixtapa	7 6.5%	0 0.0%	0 0.0%	0 0.0%	4 5.2%
Taxco	3 2.8%	3 9.1%	0 0.0%	0 0.0%	1 1.3%
Rest of Guerrero	1 0.9%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Hidalgo	1 0.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Puerto Vallarta	13 12.1%	4 12.1%	3 8.1%	0 0.0%	10 13.0%
Rest of Jalisco	4 3.7%	5 15.2%	1 2.7%	0 0.0%	11 14.3%
Morelia	1 0.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Morelos	3 2.8%	0 0.0%	1 2.7%	0 0.0%	9 11.7%
Nayarit	1 0.9%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Nuevo Leon	3 2.8%	1 3.0%	0 0.0%	0 0.0%	0 0.0%
Oaxaca	13 12.1%	3 9.1%	2 5.4%	1 14.3%	4 5.2%
Huatulco	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Rest of Oaxaca	5 4.7%	0 0.0%	2 5.4%	0 0.0%	7 9.1%
Puebla	5 4.7%	2 6.1%	1 2.7%	0 0.0%	3 3.9%
Queretaro	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Cancun	19 17.8%	12 36.4%	5 13.5%	1 14.3%	20 26.0%
Cozumel	3 2.8%	0 0.0%	0 0.0%	0 0.0%	2 2.6%
Rest of Q.Roo	3 2.8%	0 0.0%	1 2.7%	1 14.3%	0 0.0%
San Luis Potosi	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Sinaloa	4 3.7%	0 0.0%	0 0.0%	0 0.0%	5 6.5%
Sonora	0 0.0%	0 0.0%	1 2.7%	0 0.0%	1 1.3%
Tabasco	2 1.9%	1 3.0%	0 0.0%	0 0.0%	0 0.0%
Tamaulipas	0 0.0%	1 3.0%	1 2.7%	0 0.0%	1 1.3%
Tlaxcala	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Veracruz	8 7.5%	4 12.1%	3 8.1%	0 0.0%	7 9.1%
Merida	10 9.3%	0 0.0%	2 5.4%	1 14.3%	1 1.3%
Rest of Yucatan	3 2.8%	1 3.0%	4 10.8%	1 14.3%	2 2.6%
Zacatecas	3 2.8%	0 0.0%	0 0.0%	1 14.3%	1 1.3%
NA	8 7.5%	4 12.1%	6 16.2%	1 14.3%	5 6.5%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-8

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
24. Problems					
Pollution	28 26.2%	9 27.3%	4 10.8%	1 14.3%	12 15.6%
Traffic	3 2.8%	2 6.1%	0 0.0%	0 0.0%	3 3.9%
Overcrowdedness	1 0.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unclean	5 4.7%	0 0.0%	6 16.2%	0 0.0%	1 1.3%
Street	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Climate	2 1.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Security	2 1.9%	0 0.0%	3 8.1%	0 0.0%	8 10.4%
Signs for foreigners	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Poverty	4 3.7%	0 0.0%	2 5.4%	0 0.0%	0 0.0%
No respect for rules	0 0.0%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Transportation	2 1.9%	0 0.0%	0 0.0%	0 0.0%	3 3.9%
Lack of hospitality	0 0.0%	0 0.0%	1 2.7%	0 0.0%	1 1.3%
Indecency	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Crime	2 1.9%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Language barrier	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Corruption	2 1.9%	0 0.0%	0 0.0%	0 0.0%	2 2.6%
Beggar	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Telephone service	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Public services	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Tourist services	2 1.9%	2 6.1%	1 2.7%	0 0.0%	1 1.3%
Food	4 3.7%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
Street vendors	3 2.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Fading Mexican culture	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Bureaucratic officers	1 0.9%	0 0.0%	1 2.7%	0 0.0%	1 1.3%
Poor public services	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Taxi	0 0.0%	1 3.0%	0 0.0%	0 0.0%	3 3.9%
Public transportation	0 0.0%	1 3.0%	0 0.0%	0 0.0%	3 3.9%
Police	4 3.7%	0 0.0%	1 2.7%	0 0.0%	2 2.6%
Political problems	2 1.9%	3 9.1%	1 2.7%	0 0.0%	6 7.8%
Not punctual	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.3%
Lack of promotion	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%
Taboos	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Machismo	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
American influence	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Airport	26 24.3%	12 36.4%	11 29.7%	3 42.9%	28 36.4%
Too many foreigner	0 0.0%	0 0.0%	1 2.7%	0 0.0%	0 0.0%
25. Male/female					
Male	51 47.7%	11 33.3%	15 40.5%	3 42.9%	49 63.6%
Female	56 52.3%	22 66.7%	22 59.5%	4 57.1%	28 36.4%
26. Age					
15-19	3 2.8%	1 3.0%	0 0.0%	0 0.0%	1 1.3%
20-24	11 10.3%	3 9.1%	4 10.8%	0 0.0%	5 6.5%
25-29	11 10.3%	4 12.1%	8 21.6%	4 57.1%	7 9.1%
30-34	12 11.2%	4 12.1%	9 24.3%	1 14.3%	23 29.9%
35-39	18 16.8%	2 6.1%	4 10.8%	2 28.6%	15 19.5%
40-44	10 9.3%	3 9.1%	1 2.7%	0 0.0%	6 7.8%
45-49	8 7.5%	5 15.2%	0 0.0%	0 0.0%	8 10.4%
50-54	12 11.2%	1 3.0%	2 5.4%	0 0.0%	4 5.2%
55-59	8 7.5%	4 12.1%	2 5.4%	0 0.0%	2 2.6%
60-64	5 4.7%	3 9.1%	4 10.8%	0 0.0%	3 3.9%
65-	9 8.4%	3 9.1%	3 8.1%	0 0.0%	3 3.9%

Source: JICA study team

Table A.1.7 Results of airport survey by regional market segment (VFR)-9

	Southbound	Northbound	Westbound	Eastbound	Paisano
Total	107 100.0%	33 100.0%	37 100.0%	7 100.0%	77 100.0%
27. Marital status					
Single	41 38.3%	10 30.3%	21 56.8%	5 71.4%	11 14.3%
Married	52 48.6%	21 63.6%	11 29.7%	2 28.6%	57 74.0%
Others	14 13.1%	2 6.1%	5 13.5%	0 0.0%	9 11.7%
29. Occupation					
Management	9 8.4%	3 9.1%	1 2.7%	0 0.0%	0 0.0%
Sales/marketing	11 10.3%	2 6.1%	1 2.7%	1 14.3%	1 1.3%
Government/military	5 4.7%	0 0.0%	2 5.4%	0 0.0%	2 2.6%
Professional	21 19.6%	5 15.2%	6 16.2%	1 14.3%	8 10.4%
Teacher	7 6.5%	1 3.0%	3 8.1%	1 14.3%	0 0.0%
Self-employed	10 9.3%	1 3.0%	0 0.0%	2 28.6%	10 13.0%
Employees	27 25.2%	4 12.1%	8 21.6%	0 0.0%	35 45.5%
Student	5 4.7%	2 6.1%	4 10.8%	1 14.3%	4 5.2%
Housewife	5 4.7%	11 33.3%	4 10.8%	0 0.0%	13 16.9%
Retired	6 5.6%	2 6.1%	6 16.2%	0 0.0%	3 3.9%
Others	1 0.9%	2 6.1%	2 5.4%	1 14.3%	1 1.3%

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-1

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
1. Total nights spent										
1-5 nights	119	59.2%	88	41.5%	33	24.6%	2	10.5%	14	58.3%
6-10 nights	52	25.9%	78	36.8%	58	43.3%	6	31.6%	6	25.0%
11-15 nights	10	5.0%	10	4.7%	6	4.5%	1	5.3%	3	12.5%
16-20	5	2.5%	8	3.8%	8	6.0%	0	0.0%	1	4.2%
21-25	0	0.0%	1	0.5%	8	6.0%	2	10.5%	0	0.0%
26-30	5	2.5%	6	2.8%	3	2.2%	2	10.5%	0	0.0%
More than 1 month	9	4.5%	15	7.1%	14	10.4%	6	31.6%	0	0.0%
Average	8.9		14.3		17.4		27.3		6.2	
2. Nights spent in Mex										
1-5 nights	120	59.7%	92	43.4%	37	27.6%	6	31.6%	14	58.3%
6-10	51	25.4%	77	36.3%	59	44.0%	6	31.6%	8	33.3%
11-15	10	5.0%	8	3.8%	8	6.0%	0	0.0%	2	8.3%
16-20	5	2.5%	11	5.2%	5	3.7%	0	0.0%	0	0.0%
21-25	0	0.0%	4	1.9%	5	3.7%	1	5.3%	0	0.0%
25-30	5	2.5%	6	2.8%	4	3.0%	1	5.3%	0	0.0%
30-	12	6.0%	12	5.7%	15	11.2%	5	26.3%	0	0.0%
Average	8.8		13.1		16.3		22.1		5.6	
3. Combined countries										
Combined	3	1.5%	16	7.5%	12	9.0%	7	36.8%	2	8.3%
Not combined	198	98.5%	196	92.5%	122	91.0%	12	63.2%	22	91.7%
4. Combined countries										
Canada	0	0.0%	0	0.0%	0	0.0%	1	5.3%	0	0.0%
USA	1	0.5%	4	1.9%	2	1.5%	3	15.8%	0	0.0%
Guatemala	1	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Belize	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
El Salvador	0	0.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Honduras	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Other C.A.	0	0.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
South America	0	0.0%	1	0.5%	2	1.5%	1	5.3%	0	0.0%
Caribbean	0	0.0%	0	0.0%	1	0.7%	0	0.0%	2	8.3%
Others	0	0.0%	8	3.8%	2	1.5%	2	10.5%	0	0.0%
6. Accommodation type										
Hotel	170	84.6%	187	88.2%	122	91.0%	18	94.7%	12	50.0%
Friend's & relative's	27	13.4%	18	8.5%	10	7.5%	1	5.3%	12	50.0%
Trailer park	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Camp site	2	1.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Villa & condo	4	2.0%	0	0.0%	1	0.7%	0	0.0%	2	8.3%
Other accommodation	8	4.0%	15	7.1%	6	4.5%	1	5.3%	0	0.0%
06a. Average nights										
Hotel (tourist nights)	6.1	3.0%	9.8	4.6%	10.7	8.0%	20.4	107.4%	3.9	16.3%
Friend's & relative's (nights)	15	7.5%	29.6	14.0%	51.7	38.6%	18	94.7%	6.2	25.8%
Trailer park	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Campsite	13	6.5%	18	8.5%	0	0.0%	0	0.0%	0	0.0%
Villa & condo	5.2	2.6%	0	0.0%	21	15.7%	0	0.0%	7	29.2%
Other accommodation	36	17.9%	26.1	12.3%	58.2	43.4%	33	173.7%	0	0.0%

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-2

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
5. Visited destination										
Aguascalientes	1	0.5%	22	10.4%	1	0.7%	0	0.0%	0	0.0%
Baja California	1	0.5%	2	0.9%	1	0.7%	1	5.3%	0	0.0%
Los Cabos	11	5.5%	0	0.0%	1	0.7%	1	5.3%	0	0.0%
Rest of BCS	0	0.0%	0	0.0%	2	1.5%	0	0.0%	0	0.0%
Campeche	2	1.0%	1	0.5%	1	0.7%	0	0.0%	0	0.0%
Coahuila	3	1.5%	2	0.9%	4	3.0%	0	0.0%	0	0.0%
Colima	1	0.5%	3	1.4%	1	0.7%	0	0.0%	0	0.0%
San Cristobal	0	0.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Rest of Chiapas	1	0.5%	2	0.9%	3	2.2%	0	0.0%	1	4.2%
Chihuahua	0	0.0%	1	0.5%	0	0.0%	1	5.3%	0	0.0%
DF	121	60.2%	146	68.9%	105	78.4%	16	84.2%	15	62.5%
Durango	0	0.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Mexico	6	3.0%	6	2.8%	4	3.0%	0	0.0%	1	4.2%
Guanajuato	8	4.0%	7	3.3%	5	3.7%	0	0.0%	2	8.3%
Acapulco	9	4.5%	1	0.5%	6	4.5%	0	0.0%	0	0.0%
Ixtapa	0	0.0%	1	0.5%	1	0.7%	0	0.0%	1	4.2%
Taxco	0	0.0%	0	0.0%	7	5.2%	0	0.0%	0	0.0%
Guerrero rde	2	1.0%	2	0.9%	1	0.7%	0	0.0%	0	0.0%
Hidalgo	0	0.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Puerto Vallarta	1	0.5%	3	1.4%	1	0.7%	0	0.0%	0	0.0%
Rest of Jalisco	14	7.0%	29	13.7%	18	13.4%	1	5.3%	4	16.7%
Michoacan	4	2.0%	5	2.4%	1	0.7%	0	0.0%	0	0.0%
Morelos	9	4.5%	7	3.3%	6	4.5%	4	21.1%	1	4.2%
Nayarit	0	0.0%	5	2.4%	0	0.0%	0	0.0%	0	0.0%
Nuevo Leon	4	2.0%	19	9.0%	13	9.7%	3	15.8%	0	0.0%
Oaxaca	11	5.5%	2	0.9%	2	1.5%	1	5.3%	1	4.2%
Huatulco	1	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Rest of Oaxaca	0	0.0%	1	0.5%	2	1.5%	0	0.0%	0	0.0%
Puebla	7	3.5%	3	1.4%	7	5.2%	0	0.0%	1	4.2%
Queretaro	6	3.0%	9	4.2%	4	3.0%	0	0.0%	0	0.0%
Cancun	10	5.0%	7	3.3%	6	4.5%	1	5.3%	0	0.0%
Cozumel	1	0.5%	0	0.0%	2	1.5%	0	0.0%	0	0.0%
Q.Roo rde	0	0.0%	0	0.0%	2	1.5%	0	0.0%	0	0.0%
San Luis Potosi	3	1.5%	0	0.0%	0	0.0%	2	10.5%	1	4.2%
Sinaloa	2	1.0%	2	0.9%	2	1.5%	0	0.0%	0	0.0%
Sonora	0	0.0%	2	0.9%	0	0.0%	0	0.0%	0	0.0%
Tabasco	3	1.5%	2	0.9%	1	0.7%	0	0.0%	0	0.0%
Tamaulipas	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tlaxcala	1	0.5%	0	0.0%	2	1.5%	0	0.0%	0	0.0%
Veracruz	7	3.5%	4	1.9%	2	1.5%	0	0.0%	1	4.2%
Merida	5	2.5%	1	0.5%	4	3.0%	1	5.3%	1	4.2%
Rest of Yucatan	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Zacatecas	0	0.0%	1	0.5%	1	0.7%	0	0.0%	0	0.0%
NA	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-3

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
05a. Destination (nights)										
Acapulco	15.7	7.8%	2	0.9%	5	3.7%	0	0.0%	0	0.0%
Aguascalientes	2	1.0%	5.8	2.7%	2	1.5%	0	0.0%	0	0.0%
Baja California	6	3.0%	15.5	7.3%	3	2.2%	1	5.3%	0	0.0%
Campeche	3	1.5%	5	2.4%	22	16.4%	0	0.0%	0	0.0%
Cancun	4.6	2.3%	5.1	2.4%	4.2	3.1%	2	10.5%	0	0.0%
Chihuahua	5	2.5%	1	0.5%	0	0.0%	14	73.7%	0	0.0%
Coahuila	7.7	3.8%	7.5	3.5%	22.8	17.0%	0	0.0%	0	0.0%
Colima	3	1.5%	4.3	2.0%	1	0.7%	0	0.0%	0	0.0%
Cozumel	3	1.5%	0	0.0%	6.5	4.9%	0	0.0%	0	0.0%
DF	5.8	2.9%	9.1	4.3%	6.4	4.8%	8.3	43.7%	4.3	17.9%
Durango	0	0.0%	4	1.9%	0	0.0%	0	0.0%	0	0.0%
Guanajuato	2.7	1.3%	13.4	6.3%	15.6	11.6%	0	0.0%	6	25.0%
Hidalgo	0	0.0%	0	0.0%	15	11.2%	0	0.0%	0	0.0%
Huatulco	6	3.0%	30	14.2%	0	0.0%	0	0.0%	0	0.0%
Ixtapa	0	0.0%	2	0.9%	2	1.5%	0	0.0%	3	12.5%
Los Cabos	2.9	1.4%	0	0.0%	17	12.7%	5	26.3%	0	0.0%
Merida	5.2	2.6%	3	1.4%	10.8	8.1%	2	10.5%	4	16.7%
Mexico	25.8	12.8%	5	2.4%	4	3.0%	0	0.0%	4	16.7%
Michoacan	8.8	4.4%	19.6	9.2%	5	3.7%	0	0.0%	0	0.0%
Morelos	8.8	4.4%	6	2.8%	27.8	20.7%	44	231.6%	14	58.3%
Nayarit	0	0.0%	60	28.3%	0	0.0%	0	0.0%	0	0.0%
Nuevo Leon	1.8	0.9%	7.7	3.6%	5.5	4.1%	10	52.6%	0	0.0%
Oaxaca	11.2	5.6%	9.5	4.5%	3	2.2%	1	5.3%	3	12.5%
Puebla	9.7	4.8%	11.7	5.5%	51.7	38.6%	0	0.0%	1	4.2%
Puerto Vallarta	3	1.5%	4.7	2.2%	4	3.0%	0	0.0%	0	0.0%
Queretaro	9.3	4.6%	1.9	0.9%	5.8	4.3%	0	0.0%	0	0.0%
Rest of BCS	0	0.0%	0	0.0%	10.5	7.8%	0	0.0%	0	0.0%
Rest of Chiapas	5	2.5%	6.5	3.1%	12	9.0%	0	0.0%	11	45.8%
Rest of Guerrero	5	2.5%	1	0.5%	3	2.2%	0	0.0%	0	0.0%
Rest of Jalisco	3	1.5%	4.3	2.0%	8.2	6.1%	6	31.6%	4	16.7%
Rest of Oaxaca	0	0.0%	150	70.8%	4	3.0%	0	0.0%	0	0.0%
Rest of Q Roo	0	0.0%	0	0.0%	18	13.4%	0	0.0%	0	0.0%
Rest of Yucatan	14	7.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
San Cristobal	0	0.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
San Luis Potosi	6.3	3.1%	0	0.0%	0	0.0%	24.5	128.9%	1	4.2%
Sinaloa	6	3.0%	7	3.3%	20.5	15.3%	0	0.0%	0	0.0%
Sonora	0	0.0%	13	6.1%	0	0.0%	0	0.0%	0	0.0%
Tabasco	23	11.4%	3.5	1.7%	23.5	17.5%	0	0.0%	0	0.0%
Tamaulipas	5	2.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taxco	0	0.0%	0	0.0%	4.6	3.4%	0	0.0%	0	0.0%
Tlaxcala	2	1.0%	0	0.0%	21	15.7%	0	0.0%	0	0.0%
Veracruz	5.4	2.7%	7.2	3.4%	28.5	21.3%	0	0.0%	2	8.3%
Zacatecas	0	0.0%	3	1.4%	16	11.9%	0	0.0%	0	0.0%
NA	3	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
07. Traveler type										
Holiday	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
VFR	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Incentive	1	0.5%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Convention	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Business	148	73.6%	127	59.9%	106	79.1%	16	84.2%	13	54.2%
Others	52	25.9%	85	40.1%	27	20.1%	3	15.8%	11	45.8%

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-4

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
8. Holiday purpose										
Beach	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Nature/wildlife	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Archaeological sites	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Colonial cities	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Indigenous culture/people	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sports activities	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Entertainments	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Gourmet	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Shopping	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Others	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
09. Travel companion										
Alone	112	55.7%	115	54.2%	82	61.2%	10	52.6%	17	70.8%
Spouse	19	9.5%	15	7.1%	6	4.5%	1	5.3%	2	8.3%
Family	9	4.5%	9	4.2%	1	0.7%	0	0.0%	2	8.3%
Friends	15	7.5%	16	7.5%	7	5.2%	1	5.3%	0	0.0%
Business associates	5	2.5%	1	0.5%	1	0.7%	4	21.1%	1	4.2%
Others	39	19.4%	40	18.9%	37	27.6%	3	15.8%	2	8.3%
10. Use of tour package										
Used	12	6.0%	10	4.7%	14	10.4%	2	10.5%	0	0.0%
Not used	189	94.0%	202	95.3%	120	89.6%	17	89.5%	24	100.0%
10a. Use of charter flights										
Scheduled flights	12	6.0%	8	3.8%	12	9.0%	2	10.5%	0	0.0%
Charter flights	0	0.0%	2	0.9%	2	1.5%	0	0.0%	0	0.0%
10b. Purchase channel										
Travel agency	10	5.0%	8	3.8%	14	10.4%	2	10.5%	0	0.0%
Airline	0	0.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Others	2	1.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
10c. All-inclusive package										
All inclusive	7	3.5%	5	2.4%	10	7.5%	1	5.3%	0	0.0%
Partly inclusive	4	2.0%	5	2.4%	4	3.0%	0	0.0%	0	0.0%
Others	1	0.5%	0	0.0%	0	0.0%	1	5.3%	0	0.0%
11. Past visits										
Past visits	16.5	8.2%	9.8	4.6%	6.1	4.6%	2.2	11.6%	30.3	126.3%
First visit	60	29.9%	84	39.6%	69	51.5%	10	52.6%	2	8.3%
1-3 times	34	16.9%	38	17.9%	17	12.7%	6	31.6%	5	20.8%
3-5 times	27	13.4%	35	16.5%	23	17.2%	2	10.5%	7	29.2%
6 times & above	81	40.3%	63	29.7%	32	23.9%	2	10.5%	12	50.0%
12. Total expenditure										
Less than \$500	4	2.0%	4	1.9%	2	1.5%	0	0.0%	2	8.3%
\$500-1000	40	19.9%	26	12.3%	5	3.7%	1	5.3%	3	12.5%
\$1000-1500	46	22.9%	31	14.6%	9	6.7%	0	0.0%	7	29.2%
\$1500-2000	27	13.4%	28	13.2%	11	8.2%	1	5.3%	2	8.3%
\$2000-2500	22	10.9%	20	9.4%	16	11.9%	4	21.1%	3	12.5%
\$2500-3000	7	3.5%	7	3.3%	3	2.2%	0	0.0%	0	0.0%
\$3000-3500	9	4.5%	12	5.7%	12	9.0%	0	0.0%	2	8.3%
\$3500-4000	0	0.0%	3	1.4%	4	3.0%	0	0.0%	0	0.0%
\$4000 -	6	3.0%	14	6.6%	16	11.9%	4	21.1%	2	8.3%
Expenditure average	1503		2105		3581		5840		1834	

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-5

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
13. Expenditure in Mex										
Less than \$500	36	17.9%	16	7.5%	9	6.7%	4	21.1%	7	29.2%
\$500-1000	39	19.4%	33	15.6%	10	7.5%	2	10.5%	3	12.5%
\$1000-1500	17	8.5%	21	9.9%	14	10.4%	5	26.3%	3	12.5%
\$1500-2000	11	5.5%	13	6.1%	4	3.0%	1	5.3%	0	0.0%
\$2000-2500	4	2.0%	7	3.3%	5	3.7%	0	0.0%	0	0.0%
\$2500-3000	1	0.5%	3	1.4%	5	3.7%	0	0.0%	0	0.0%
\$3000-3500	5	2.5%	2	0.9%	3	2.2%	1	5.3%	0	0.0%
\$3500-4000	2	1.0%	0	0.0%	1	0.7%	0	0.0%	1	4.2%
\$4000-	2	1.0%	3	1.4%	7	5.2%	1	5.3%	1	4.2%
Expenditure average	1018		1338		2091		2749		1213	
14. Shopping expenditure										
Less than \$100	114	56.7%	85	40.1%	60	44.8%	5	26.3%	11	45.8%
\$100-200	30	14.9%	25	11.8%	11	8.2%	6	31.6%	2	8.3%
\$200-300	27	13.4%	18	8.5%	13	9.7%	4	21.1%	7	29.2%
\$300-400	15	7.5%	27	12.7%	10	7.5%	0	0.0%	2	8.3%
\$400-500	3	1.5%	5	2.4%	3	2.2%	1	5.3%	0	0.0%
\$500-	12	6.0%	51	24.1%	37	27.6%	3	15.8%	2	8.3%
Shopping average	122.2		389.7		316.5		274.5		165.4	
12a. Accompanying kids										
Yes	3	1.5%	4	1.9%	0	0.0%	0	0.0%	2	8.3%
No	198	98.5%	208	98.1%	134	100.0%	19	100.0%	22	91.7%
Average	1.7		1		-		-		1.5	
12b. Total number of adults										
Average group size	1.3	0.6%	1.3	0.6%	1.2	0.9%	1.3	6.8%	1.1	4.6%
15. Improvement score										
Security	1.9	0.9%	2.3	1.1%	2.3	1.7%	2.7	14.2%	2.9	12.1%
Vender	2	1.0%	2.2	1.0%	2	1.5%	2.7	14.2%	2.3	9.6%
Hygiene	2.3	1.1%	2.2	1.0%	2.4	1.8%	2.8	14.7%	2.8	11.7%
Contact w/locals	1.5	0.7%	1.5	0.7%	1.4	1.0%	1.9	10.0%	1.5	6.3%
Hotel service	1.3	0.6%	1.4	0.7%	1.3	1.0%	2.1	11.1%	1.4	5.8%
Contact w/locals	1.5	0.7%	1.5	0.7%	1.4	1.0%	1.9	10.0%	1.5	6.3%
Hotel services	1.3	0.6%	1.4	0.7%	1.3	1.0%	2.1	11.1%	1.4	5.8%
Hotel facility	1.3	0.6%	1.4	0.7%	1.3	1.0%	2.2	11.6%	1.4	5.8%
Shopping attraction	1.5	0.7%	1.4	0.7%	1.4	1.0%	2.2	11.6%	1.4	5.8%
Environ. protection	2.9	1.4%	3.3	1.6%	3.4	2.5%	2.7	14.2%	3.8	15.8%
Tourist info	1.9	0.9%	2.1	1.0%	2	1.5%	2.8	14.7%	2.3	9.6%
Tour guide	1.6	0.8%	1.7	0.8%	1.9	1.4%	2.1	11.1%	3	12.5%
Public transportation	2	1.0%	1.8	0.8%	2	1.5%	2.5	13.2%	2.4	10.0%
Signs for foreigners	1.7	0.8%	1.8	0.8%	1.8	1.3%	2.7	14.2%	1.7	7.1%
16. Resort type										
Urbanized resort	49	24.4%	43	20.3%	23	17.2%	5	26.3%	5	20.8%
Village type resort	85	42.3%	79	37.3%	56	41.8%	9	47.4%	8	33.3%
Enclave type resort	45	22.4%	78	36.8%	44	32.8%	3	15.8%	7	29.2%

Source: JICA study team

Table A.1. 8 Results of airport survey by regional market segment (Business)-6

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
17. Competitor										
Canada	3	1.5%	0	0.0%	0	0.0%	1	5.3%	0	0.0%
USA	7	3.5%	7	3.3%	2	1.5%	1	5.3%	1	4.2%
Guatemala	1	0.5%	2	0.9%	1	0.7%	0	0.0%	0	0.0%
Belize	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Honduras	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Cuba	0	0.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Europe	6	3.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Caribbean	1	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Central America	3	1.5%	2	0.9%	1	0.7%	0	0.0%	0	0.0%
South America	2	1.0%	7	3.3%	3	2.2%	2	10.5%	0	0.0%
Africa	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Asia	2	1.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Oceania	0	0.0%	2	0.9%	0	0.0%	0	0.0%	0	0.0%
Unspecified	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
18. Mex's strength										
Price	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Travel time	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Security	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Climate	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Beach	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tourism attractions	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tourism services	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Shopping	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Friendly people	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Relaxing atmosphere	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Others	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
19. Influence										
Agent	24	11.9%	32	15.1%	20	14.9%	0	0.0%	1	4.2%
Brochure	8	4.0%	2	0.9%	10	7.5%	1	5.3%	1	4.2%
Advertise	9	4.5%	7	3.3%	5	3.7%	0	0.0%	0	0.0%
TV program	5	2.5%	11	5.2%	3	2.2%	1	5.3%	1	4.2%
Artide	8	4.0%	4	1.9%	7	5.2%	2	10.5%	0	0.0%
Friends	73	36.3%	37	17.5%	31	23.1%	1	5.3%	11	45.8%
SECTUR	4	2.0%	5	2.4%	2	1.5%	1	5.3%	1	4.2%
Others	91	45.3%	132	62.3%	73	54.5%	16	84.2%	10	41.7%
20. Recommend Mex										
Recommend	198	98.5%	210	99.1%	130	97.0%	17	89.5%	23	95.8%
Not recommend	3	1.5%	2	0.9%	4	3.0%	2	10.5%	1	4.2%
21. Want to revisit										
Yes	197	98.0%	211	99.5%	126	94.0%	16	84.2%	23	95.8%
No	4	2.0%	1	0.5%	8	6.0%	3	15.8%	1	4.2%

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-7

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
22. Destination for revisit										
Aguascalientes	1	0.5%	6	2.8%	3	2.2%	0	0.0%	0	0.0%
Baja California	9	4.5%	8	3.8%	7	5.2%	0	0.0%	2	8.3%
Los Cabos	13	6.5%	2	0.9%	0	0.0%	1	5.3%	2	8.3%
Rest of BCS	16	8.0%	23	10.8%	15	11.2%	2	10.5%	3	12.5%
Campeche	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Coahuila	0	0.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Colima	1	0.5%	1	0.5%	0	0.0%	0	0.0%	1	4.2%
San Cristobal	1	0.5%	3	1.4%	2	1.5%	0	0.0%	0	0.0%
Rest of Chiapas	5	2.5%	5	2.4%	3	2.2%	0	0.0%	2	8.3%
Chihuahua	1	0.5%	1	0.5%	2	1.5%	1	5.3%	0	0.0%
DF	41	20.4%	35	16.5%	10	7.5%	4	21.1%	5	20.8%
Durango	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Mexico	2	1.0%	5	2.4%	2	1.5%	0	0.0%	0	0.0%
Guanajuato	13	6.5%	9	4.2%	8	6.0%	0	0.0%	1	4.2%
Acapulco	28	13.9%	57	26.9%	19	14.2%	6	31.6%	5	20.8%
Ixtapa	10	5.0%	2	0.9%	5	3.7%	0	0.0%	3	12.5%
Taxco	2	1.0%	3	1.4%	4	3.0%	0	0.0%	0	0.0%
Rest of Guerrero	1	0.5%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Hidalgo	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Puerto Vallarta	20	10.0%	15	7.1%	5	3.7%	0	0.0%	3	12.5%
Rest of Jalisco	18	9.0%	26	12.3%	5	3.7%	0	0.0%	3	12.5%
Morelia	1	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Morelos	14	7.0%	6	2.8%	0	0.0%	0	0.0%	0	0.0%
Nayarit	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Nuevo Leon	6	3.0%	16	7.5%	3	2.2%	0	0.0%	2	8.3%
Oaxaca	6	3.0%	6	2.8%	6	4.5%	0	0.0%	0	0.0%
Huatulco	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Rest of Oaxaca	13	6.5%	3	1.4%	3	2.2%	1	5.3%	3	12.5%
Puebla	4	2.0%	11	5.2%	2	1.5%	0	0.0%	0	0.0%
Queretaro	3	1.5%	5	2.4%	2	1.5%	0	0.0%	1	4.2%
Cancun	45	22.4%	76	35.8%	29	21.6%	2	10.5%	6	25.0%
Cozumel	10	5.0%	3	1.4%	3	2.2%	1	5.3%	1	4.2%
Rest of Q.Roo	1	0.5%	2	0.9%	2	1.5%	0	0.0%	0	0.0%
San Luis Potosi	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Sinaloa	7	3.5%	5	2.4%	3	2.2%	1	5.3%	2	8.3%
Sonora	1	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Texasco	2	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tamaulipas	1	0.5%	3	1.4%	0	0.0%	0	0.0%	0	0.0%
Tlaxcala	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Veracruz	13	6.5%	14	6.6%	5	3.7%	0	0.0%	0	0.0%
Merida	11	5.5%	9	4.2%	9	6.7%	1	5.3%	0	0.0%
Rest of Yucatan	10	5.0%	3	1.4%	13	9.7%	0	0.0%	2	8.3%
Zacatecas	3	1.5%	1	0.5%	1	0.7%	0	0.0%	1	4.2%
NA	26	12.9%	15	7.1%	26	19.4%	4	21.1%	2	8.3%

Source: JICA study team

Table A.1.8 Results of airport survey by regional market segment (Business)-8

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
24. Problems										
Pollution	22	10.9%	47	22.2%	25	18.7%	1	5.3%	0	0.0%
Traffic	16	8.0%	4	1.9%	8	6.0%	1	5.3%	4	16.7%
Overcrowdedness	2	1.0%	3	1.4%	0	0.0%	0	0.0%	0	0.0%
Unclean	6	3.0%	2	0.9%	3	2.2%	0	0.0%	1	4.2%
Street	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	4.2%
Climate	0	0.0%	4	1.9%	0	0.0%	0	0.0%	0	0.0%
Security	4	2.0%	5	2.4%	12	9.0%	1	5.3%	1	4.2%
Signs for foreigners	1	0.5%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
Poverty	6	3.0%	2	0.9%	12	9.0%	0	0.0%	0	0.0%
No respect for rules	1	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Transportation	2	1.0%	0	0.0%	3	2.2%	0	0.0%	0	0.0%
Lack of hospitality	2	1.0%	1	0.5%	2	1.5%	0	0.0%	1	4.2%
Indecency	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Crime	4	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Language barrier	2	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Corruption	2	1.0%	1	0.5%	1	0.7%	0	0.0%	0	0.0%
Beggar	3	1.5%	1	0.5%	1	0.7%	0	0.0%	0	0.0%
Telephose service	1	0.5%	2	0.9%	0	0.0%	0	0.0%	1	4.2%
Public services	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tourist services	2	1.0%	1	0.5%	0	0.0%	0	0.0%	0	0.0%
Food	7	3.5%	6	2.8%	4	3.0%	0	0.0%	0	0.0%
Street vendors	2	1.0%	6	2.8%	0	0.0%	0	0.0%	0	0.0%
Fading Mexican culture	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Bureaucratic officers	1	0.5%	5	2.4%	3	2.2%	0	0.0%	0	0.0%
Poor public services	0	0.0%	3	1.4%	0	0.0%	0	0.0%	0	0.0%
Taxi	4	2.0%	7	3.3%	3	2.2%	0	0.0%	0	0.0%
Public transportation	4	2.0%	7	3.3%	3	2.2%	0	0.0%	0	0.0%
Police	2	1.0%	2	0.9%	0	0.0%	1	5.3%	0	0.0%
Political problems	2	1.0%	4	1.9%	7	5.2%	0	0.0%	1	4.2%
Not punctual	2	1.0%	0	0.0%	2	1.5%	0	0.0%	0	0.0%
Lack of promotion	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Taboos	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Machismo	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
American influence	1	0.5%	1	0.5%	2	1.5%	0	0.0%	0	0.0%
Airport	75	37.3%	79	37.3%	34	25.4%	10	52.6%	12	50.0%
Too many foreigner	0	0.0%	0	0.0%	1	0.7%	0	0.0%	0	0.0%
25. Male/female										
Male	145	72.1%	166	78.3%	111	82.8%	17	89.5%	17	70.8%
Female	56	27.9%	46	21.7%	23	17.2%	2	10.5%	7	29.2%
26. Age										
15-19	2	1.0%	3	1.4%	0	0.0%	0	0.0%	0	0.0%
20-24	10	5.0%	19	9.0%	11	8.2%	0	0.0%	2	8.3%
25-29	24	11.9%	29	13.7%	17	12.7%	3	15.8%	2	8.3%
30-34	25	12.4%	36	17.0%	14	10.4%	7	36.8%	5	20.8%
35-39	26	12.9%	40	18.9%	16	11.9%	1	5.3%	6	25.0%
40-44	23	11.4%	29	13.7%	19	14.2%	2	10.5%	7	29.2%
45-49	26	12.9%	20	9.4%	19	14.2%	2	10.5%	1	4.2%
50-54	27	13.4%	22	10.4%	18	13.4%	3	15.8%	1	4.2%
55-59	13	6.5%	7	3.3%	12	9.0%	0	0.0%	0	0.0%
60-64	13	6.5%	6	2.8%	5	3.7%	1	5.3%	0	0.0%
65-	12	6.0%	1	0.5%	3	2.2%	0	0.0%	0	0.0%

Source: JICA study team

Table A.1. 8 Results of airport survey by regional market segment (Business)-9

	Southbound		Northbound		Westbound		Eastbound		Paisano	
Total	201	100.0%	212	100.0%	134	100.0%	19	100.0%	24	100.0%
27. Marital status										
Single	65	32.3%	57	26.9%	36	26.9%	8	42.1%	9	37.5%
Married	126	62.7%	139	65.6%	86	64.2%	11	57.9%	15	62.5%
Others	10	5.0%	16	7.5%	12	9.0%	0	0.0%	0	0.0%
29. Occupation										
Management	46	22.9%	54	25.5%	54	40.3%	5	26.3%	6	25.0%
Sales/marketing	33	16.4%	31	14.6%	16	11.9%	1	5.3%	2	8.3%
Government/military	3	1.5%	12	5.7%	3	2.2%	1	5.3%	0	0.0%
Professional	66	32.8%	59	27.8%	39	29.1%	1	5.3%	9	37.5%
Teacher	8	4.0%	7	3.3%	4	3.0%	0	0.0%	0	0.0%
Self-employed	12	6.0%	14	6.6%	6	4.5%	1	5.3%	2	8.3%
Employees	14	7.0%	11	5.2%	3	2.2%	7	36.8%	2	8.3%
Student	3	1.5%	12	5.7%	6	4.5%	0	0.0%	1	4.2%
Housewife	6	3.0%	1	0.5%	1	0.7%	0	0.0%	2	8.3%
Retired	7	3.5%	2	0.9%	1	0.7%	1	5.3%	0	0.0%
Others	3	1.5%	9	4.2%	1	0.7%	2	10.5%	0	0.0%

Source: JICA study team

A.1.1.4. Questionnaire sheets

Q1. How long is your whole travel itinerary including nights spent out side of Mexico?

() night(s)

Q2. How long is your travel itinerary in México?

() night(s)

Q3. Did you visit other country(s) other than Mexico?

1. Yes
2. No

If you choose "Yes" in the above question, please proceed to Q4. Otherwise proceed to Q5.

Q4. What are your combined destinations with Mexico?

Name of country Number of nights

() ()

() ()

() ()

() ()

Q5. Where did you stay in Mexico?

Name of destination Number of nights

() ()

() ()

() ()

() ()

Q6. What type of accommodation did you stay in Mexico?

1. Hotel () nights

-
2. Friend's or relative's home () nights
 3. Trailer park () nights
 4. Camp site () nights
 5. Villa and condominium () nights
 6. Others () nights

Q7. What is your purpose of travel? (please choose only one)

1. Holiday
2. Visit friend(s) and relative(s)
3. Incentive
4. Convention and conference
5. Business
6. Others (please specify)

If you choose "holiday" in the above question, please proceed to Q8. Otherwise proceed to Q9.

Q8. What is the principal attraction of your visit to Mexico? (please choose only one)

1. Beach
2. Nature and wildlife
3. Archaeological sites
4. Colonial towns and architectures
5. Indigenous people and their cultures
6. Sports activities
7. Entertainment and night life
8. Food
9. Shopping
10. Others

Q9. Who is your travel companion(s)? (please choose only one)

1. Alone
2. Spouse
3. Family
4. Friend(s)
5. Family and friend(s)
6. Business associate(s)
7. Others

Q10. Did you participated in package tour to visit México?

1. Package tour using scheduled flights
2. Package tour using charter flights
3. No

Q11. How many times have you visited Mexico before?

() times excluding this visit

Q12. How much are you going to spend for the whole trip including air fare, package tour fee, food, shopping, accommodation etc.?

Amount in USD (), for () persons

Q13. How much have you spent within Mexico?

Amount in USD (), for () persons

Q14. How much have you spent for shopping in Mexico?

Amount in USD (), for () persons

Q15. How do you rate the adequacy of the following issues regarding Mexican Tourism?

	No need for improvement	Some need for improvement	Needs improvement	Strong need for improvement
Security	1	2	3	4
Control over local vendors	1	2	3	4
Hygiene	1	2	3	4
Chances to contact with local people	1	2	3	4
Services of hotels	1	2	3	4
Facility of hotels	1	2	3	4
Availability of attractive shopping items	1	2	3	4
Environmental protection	1	2	3	4
Information provided by government visitor office	1	2	3	4
Signs & interpretation boards for foreigners	1	2	3	4
Taxi service and public transport	1	2	3	4

Q16. Which type of beach resort area do you like the best? (please choose one)

1. City type resort area with good facility hotels and sophisticated entertainment
2. Village type resort area with relatively dispersed and controlled development harmonizing with local community
3. Enclave type resort located in the nature isolated from local community

Q17. You might have considered other destinations before you finally chose Mexico. What was the most prospective destination next to Mexico?

()

Q18. What was the most important reason for choosing México? (Please choose only one)

-
1. Lower price
 2. Shorter travel time
 3. Better security condition
 4. Better climate
 5. Better beaches
 6. Richer tourist attractions
 7. Better tourism related services
 8. More appealing shopping items
 9. More friendly people
 10. More relaxing atmosphere
 11. Others (please specify _____)

Q19. What influenced you to come to visit Mexico? (Please choose all that apply)

1. Travel agent
2. Brochures
3. Advertisement (Poster, TV, Magazines)
4. TV programs
5. Magazine and newspaper articles
6. Friends
7. Mexican government tourist office abroad
8. Others (please specify _____)

Q20. Would you recommend your family and friends to visit Mexico?

1. Yes
2. No

Q21. Would you like to visit Mexico again?

1. Yes
2. No (please proceed to Q24)

The Mexican government is considering developing gambling casinos that will have slot machines and games such as craps, blackjack, roulette and keno in several cities and resort areas.

Q22. What aspect of your staying in Mexico you did not like?

(_____)

The following questions are only to be used for a population profile. We would appreciate it very much if you could answer as appropriate.

Q23. Sex

1. Male
2. Female

Q24. Age

-
1. 15-19 years old
 2. 20-24
 3. 25-29
 4. 30-34
 5. 35-39
 6. 40-44
 7. 45-49
 8. 50-54
 9. 55-59
 - 10.60-64
 - 11.65 and over

Q25. Marital status

1. Single
2. Married
3. Others

Q26. Country of residence

Country (), State/ Province ()

Q27. Occupation

1. Management/ executive
2. Sales/ Marketing
3. Government/ military
4. Professional (doctor, lawyer, etc.)
5. Teacher
6. Student
7. Homemaker (housewife)
8. Retired
9. Other self-employed
10. Other employed
11. Other (please specify _____)

A.1.2. Survey on the travel trade

A.1.2.1. Outline of the surveys

JICA Study Team has conducted a travel trade survey to obtain tourism market information such as travel pattern, travel purpose, strengths and weaknesses of Mexican tourism, tourism-related life style, as well as evaluation of SECTUR's promotion activities.

The information obtained was used as basic data for this study.

A.1.2.2. Methodology

(1) Survey methods

Direct interview and mail survey were used depending on the location of respondents. They are summarized as follows:

- Hoteliers, airline companies, travel agents, and tour operators in Mexico; interview survey
- Travel agents and wholesalers in Japan; interview survey
- Travel agents and wholesalers in USA; interview survey and mail survey
- Travel agents and wholesalers in Europe; mail survey

(2) Survey periods

Survey periods were as follows:

- Interviews with the travel trade in Mexico; from September, 1995 to August, 1996,
- Interviews with the travel trade in USA; from October 1995 to January 1996,
- Interviews with the travel trade in Japan; September 1995, and
- Questionnaire survey in USA, Europe and South America; December 1996.

(3) Number of respondents/interviewees

Total number of respondents/interviewees: 83

Interviews in Mexico: 45, (hoteliers: 13, tour operators/travel agents: 28, others: 4),

Interviews with wholesalers/travel agents in USA and Japan: 25

Mail survey in USA and Europe: 22 (Of which, 9 respondents were also interviewed)

(4) Surveyor

Interviews were conducted by the members of JICA Study Team.

Questionnaire sheets were sent to the travel trade in Europe and USA through SECTUR's delegation offices.

(5) Limitation of the survey

Interviews and questionnaire survey of the travel trade does not give much information on those who don't use tour packages. More specifically, they principally reveals market characteristics of "package tourists" segment as used to analyze the result of the questionnaire survey at major international airport.

A.1.2.3. Findings

Following section shows representative comments obtained from the travel trade survey including the mail survey. It is classified by type of information and by market segment.

(1) Existing conditions of respective markets

a. US market

- Cancun is a 3-night destination for Miami. 5 nights is an average itinerary for Acapulco. (Wholesaler in Miami)
- Peak season to go to Mexico is summer in Florida, not in winter like the northern part of USA. (Wholesaler in Miami)
- Beach is the principal product of Mexico in the Florida market. Summer is the peak season. (Wholesaler in Miami)

-
- Three-night beach trip to Mexico with some nightlife is a very popular form of travel in Miami. (Wholesaler, Miami)
 - The most selling itinerary is 5-6 nights from East Coast, and 3-4 nights from West Coast. (Wholesaler, New York)
 - There is no distinct seasonal fluctuation in the California Market. Summer is the season for family and young people. Winter is for more affluent people. (Wholesaler, Los Angeles)
 - Typical travel pattern of Americans is to travel three times a year, of which one time is spared for domestic travel. Average expenditure for a trip is \$600. (Wholesaler, Chicago)
 - Combination of Mexico city and Acapulco or Ixtapa is the most selling. (Wholesaler, Chicago)
 - People come to make shorter trips more often. (Wholesaler, Miami)
 - Americans used to take 2-3 weeks holiday at a time. Now they take short holidays a few times a year. (Wholesaler, Chicago)
 - Travel period has shortened over the decade. (Wholesaler, Miami)
 - Last-minute booking has increased. (Wholesaler, Miami)
 - Consumers have become more knowledgeable and keener on price. (Wholesaler, New York)
 - Popular tour packages from LA to Mexico are Los Cabos (4 - 7 days, \$600 - \$800), Cancun/Cozumel (7 days, \$1700), Puerto Vallarta (3 - 7 days, \$350), Mazatlan (3 - 7 days, \$350), Mexico City (8 days, \$1000). Puerto Vallarta and Mazatlan are popular for young people and students while cultural tourism around Mexico City is for the 40s and above. (Travel agent, Los Angeles)
 - All-inclusive resort is becoming popular as it makes guests more relaxed. (Wholesaler, Miami)
 - Greater part of Americans can't eat hot Mexican foods. It's the raison d'être of Cancun as it has many fast food restaurants. (Wholesaler, Miami)
 - "New age travelers" is increasing importance in the USA, in particular, in northern California. They make pilgrimage tours to pyramids in Mexico. (Wholesaler of ecotourism, Miami)
 - High-rise hotel is not a problem in our market. "Deluxe" is almost synonymous with "high-rise." (Wholesaler, Miami)
 - Not all the Americans prefer hotels in Cancun. There is a good volume of people who prefer ecotourism. (Wholesaler specialized in ecotourism, Miami)
 - Booking of tours has come to be made immediately before departure. Consumers has become more demanding, and hotel name must be specified at the time of booking. (Wholesaler, Miami)
 - Upscale clients prefer golf and cruising while families and young couples prefer Club Med. (Travel agents, Los Angeles)
 - The greatest demand to Mexico is for beaches, especially those younger than 40. Those above 40 prefer a variety of tourism objectives. (Wholesaler, Los Angeles)
 - Holiday means "beach" in the Florida market. (Wholesaler, Miami)
 - Increasing interest in history and culture. (Wholesaler, New York)
 - Beach is the principal attraction of Mexico, and Cancun is the best selling destination. (Wholesaler, New York)

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- Low-rise hotels would be accepted even by the US market. (Wholesaler, New York)
 - Students and people who are over 40 are the two major targets of cultural tourism. (Wholesaler specialized in student market and cultural tourism, Chicago)
 - Mazatlan promoted so-called student market from USA but it stopped the promotion because of the market is too wild. (Hotelier, Mazatlan)
 - Most of the visitors from the USA are couples and groups of friends. Those accompanying children are few. They seldom make a touring but prefer to stay several days in a resort hotel. (Hotelier, Mazatlan)
 - Average length of stay is 4.5 nights for domestic visitors, 5.5 for those from North America. Many Canadians, however, stay two weeks. (Hotelier, Mazatlan)
 - Visitors from California come to Puerto Vallarta to spend a long-weekend, and they don't have distinct seasonality. Visitors from the northern and eastern parts of the USA generally stays a longer period than those from California, and come in winter. Summer is the peak season for the Texas market. (Hotelier, Puerto Vallarta)
 - Canadians stay one- to two-weeks, and spend less per day compared to Americans. The Canadian market depends on charter-flights. (Hotelier, Puerto Vallarta)
 - May is the season for the student market. As they are difficult to control, the market is risky. (Hotelier, Puerto Vallarta)
 - To develop incentive market, direct flights from the east coast of the USA is important as the area is the base for large corporations that would host incentive travel. (Hotelier, Puerto Vallarta)
 - Visitors to Los Cabos generally stay 3-4 nights. Canadians, however, stay one- to two-weeks. (Tour operator, Los Cabos)
 - The US market puts importance on hotel facilities such as pool, bar, and restaurants.
 - Visitors to Los Cabos do not make an over-night touring. Length of popular itineraries is 2-5 nights. (Tour operator, Los Cabos)
 - Average length of stay for the visitors from the USA is around 5 nights. Some people includes 1 - 2 nights touring of archaeological sites. (Hotelier, Cancun)
 - For Americans, Mexico means beaches and Europe means culture. This is because Mexico made little efforts to create an image of a cultural tourism destination. (Tour operator, Mexico City)
 - Greater part of US visitors in Cancun comes from the east coast. (Tour operator, Cancun)

b. Europe

- Length of vacation is at least two weeks for the German market. They combine a touring of cultural and archaeological sites and a stay at a beach resort. Guatemala is often combined with Mexico (airline company, Mexico City).
- Prehispanic ruins and indigenous cultures are the most appealing aspect of Mexico for the German market. Colonial Cities may be the secondary attraction because similar and older cities exist in Europe. Barranca del Core could appeal to the market if promoted properly. (Airline company, Mexico City)
- Hotel zone in Cancun is interesting for ordinary Germans because such a type of development does not exist in Europe. (Airline company, Mexico City)

-
- Clientele for small and exclusive hotels in historical cities are independent tourists from Europe. Most of them are above the 40s. Businessmen in Mexico City is another important clientele. (Hotelier, Mexico)
 - Tours from Italy combine Barranca del Cobre and a touring of Baja California. Length of travel is around two weeks. Participants are generally wealthy aged people. (Tour operator, La Paz)
 - The most selling itinerary for the Dutch and Belgian market is a 4-day touring of Guadalajara - Patzcuaro - Uruapan and a 10-days stay in Puerto Vallarta. There are several one- to two-week itineraries that visit historical cities in Central Mexico. (Tour operator, Puerto Vallarta)
 - Cancun is too artificial therefore is not popular for our clients in Europe. Consumers in Europe prefer small- to medium-sized hotels in downtown to enjoy dining out. As a consequence, they don't like all-inclusive hotel. (Tour operator, Puerto Vallarta)
 - In recent years visitors from Europe increased dramatically in Puerto Vallarta, probably due to the high prices of hotels in Cancun. (Hotelier, Puerto Vallarta)
 - Europeans prefer a hotel with "colonial Mexican" design. (Hotelier, Puerto Vallarta)
 - The European market prefers a combination of a one-week bus touring of Mexico City - Oaxaca - Tehuantepec - San Cristobal de las Casas - Palenque - Campeche - Merida, and a stay at Cancun. (Tour operator, Mexico City)
 - Popular itineraries for the Spanish market is 1) 9-day tour of Mexico City - Teotihuacan - (air)- Merida - Uxmal - Chichen Itza - Cancun, and 2) 13 day tour of Mexico City - Teotihuacan - Oaxaca - Villahermosa - Palenque - Merida - Uxmal - Chichen Itza - Cancun. (Tour operator, Mexico City)
 - Sports activities are not Europeans' purpose of visit to Mexico. They may enjoy sports in Mexico but it doesn't mean that the sports activity attracted them to Mexico. (Tour operator of ecotourism and soft adventure, Mexico City)
 - Popularity of deep sea fishing and yachting is not as popular in Europe as in USA. (Tour operator, Mexico City)
 - Clients from Spain and Italy do not use Gran Turismo but 4 and 5 star hotels. (Tour operator, Mexico City)
 - The European market chooses economy- to middle-class hotels. (Tour operator, Puerto Vallarta)
 - Our clients are less willing to accept mediocre hotels in places like Palenque, Uxmal, Chichen Itza etc. (Tour operator, Germany)
 - Increasing popularity of guided tours, and individual modules such as self-driving tours. (Wholesaler, Germany)
 - Increasing interest in Chiapas. (Wholesaler, Italy)
 - Peak season of the European market is in summer. (Tour operator, Mexico City)
 - Europeans do not prefer high-rise hotels. They often use 3 - 4 star hotels. (Hotelier, Cancun)
 - Touring of the Mundo Maya area is the principal purpose of visitors from Europe. The touring takes two weeks, and before and after the touring they stay in Cancun for 1 - 3 nights. (Hotelier, Cancun)

c. Latin America

- Orlando is important for the visitors from Latin America. They prefer to combine Miami for shopping, Orlando for Disney World, and Cancun for beach and nightlife. (Wholesaler in Miami)
- Mexican colonial cities are popular in Chile and Argentine. Typical itinerary is a six-day touring of Mexico City - Querretaro - Guanajuato - Guadalajara - Patzcuaro - Mexico city. Many of them combines a stay in Acapulco after the touring. (Tour operator, Mexico City)
- Brazilians are not very interested in the Mexican culture. One good thing is that they are high-spending though. (Tour operator, Puerto Vallarta)
- The Latin American market prefer "two-core" holidays. They often combine Puerto Vallarta with Mexico City or Cancun. (Tour operator, Puerto Vallarta)
- Brazilians and Germans comes to Florida, and many of them visit Cancun as well. (Wholesaler, Miami)
- Our clients in South America sometimes request us to arrange 3 star hotels, which is unlikely in the Spanish and Italian markets which generally use 4/5 star hotels. (Tour operator, Mexico City)
- The South American market is interested in Mexican colonial cities. The most popular itinerary is a 9-day touring of Mexico City - Puebla - Mexico City - Teotihuacan - Mexico City - Taxco - Acapulco. (Tour operator, Mexico City)
- Brazilian visitors increased dramatically in Cancun. They combine Cancun with Florida. They are interested in shopping and theme parks in Florida, and nightlife and archaeological sites in Cancun. Since beaches abound in Brazil, they are not very interested in beaches in Mexico. (Hotelier, Cancun)
- Typical Brazilian itinerary is a combination of 4-5 nights in Florida and 6 nights in Cancun. Peak seasons are from Christmas to February and between July and August when Brazil is in winter. (Hotelier, Cancun)
- Brazilians prefer to hotels of the Gran Turismo class and spend a lot using credit card. This is due to their strong currency relative to US Dollar. (Hotelier, Cancun)
- Visitors from Chile and Argentine do not spend much money as Brazilians do. They are interested in historical cities in Mexico. (Hotelier, Cancun)
- Cortes Route is a popular tour itinerary for the Spanish and the South American markets. It visits Veracruz, Tlaxcara, Puebla and Mexico City. (Tour operator of ecotourism, Mexico City)
- People in Latin America has a good awareness of Mexico as the oldest country in the American continent. They know Mexico very well through TV programs and movies therefore taking them to the sites where famous movies are taken is appreciated. (Tour operator, Mexico City)
- Brazilians are entitled to one-month vacation, which is a reason for the growth of their tourism market. (Hotelier, Cancun)

d. Asian market

- Typical itinerary from Japan is a 7-day tour of Tokyo - LA - Los Cabos - Tokyo. They stay 4-5 nights in Los Cabos. Some tours add 2 nights in La Paz for diving. (Tour operator, Los Cabos)
- Visitors to Mexico are generally above the 50s, in particular, who are interested in prehispanic cultures. Los Cabos is exceptionally popular for single females. (Wholesaler, Tokyo)

-
- Individual travel is becoming popular among young people. (Tour operator, Mexico City)
 - The most popular itinerary for the Japanese market is a 8-day tour of Mexico City - Merida - Cancun, which visits historical and archeological sites. A touring of Mexico City - Taxco - Acapulco was popular until the 1980s. (Tour operator, Tokyo)
 - It is difficult to sell Colonial Cities in Japan because average Japanese do not know the history of Mexico compared with Europeans. (Tour operator, Mexico)
 - Japanese tourists prefer to dine out and shop around in resort areas. In this sense, public transportation in Cancun is highly appreciated by them. Los Cabos should introduce a similar public transportation system.
 - Our best selling itinerary is to combine a stay in Cancun with a stay in New York or Miami. (Travel agent/tour operator, Mexico City)
 - The Japanese market is divided into two types: those prefer to beach resort and enjoy shopping and theme parks, and those prefer to touring of historical and cultural sites. The former tends to be young and the latter tends to be above the 40s.
 - Participants in touring package tours are generally above the 40s while those in Cancun-only package tours are couples and honeymooners. (Tour operator, Mexico City)
 - Los Cabos is becoming popular in the Japanese market thanks to the campaign by All Nippon Airways. Young people who are interested in sports activities such as diving, marine sports, and tennis purchase package tours to Los Cabos. (Tour operator, Mexico City)
 - The most popular touring itinerary is a Mexico city - Merida - Uxmal - Chichen Itza - Cancun route for 6 nights. In some cases, Oaxaca, Palenque, and Villahermosa are added to the basic part. (Tour operator, Mexico City)
 - A Japanese travel agency/wholesaler tried to sell Colonial Cities but it gave up after a few years. In my opinion, archaeological sites and indigenous cultures should be the core image of Mexico for the Japanese market. (Tour operator, Mexico City)
 - Young people prefer to travel independently rather than using package tour. (Tour operator, Mexico City)
 - There are 3 types of Japanese tourists in Los Cabos, namely, divers, honeymooners, and golfer/game fishers. Divers are generally young while golfers are middle-aged. (Tour operator, Los Cabos)

e. Domestic market

- Rafting is increasingly popular among Mexicans. (Tour operator of ecotourism and soft adventure, Mexico City)
- Summer is the peak season for the domestic market. They travel with their family members in the season. (Hotelier, Mazatlan)
- July and August are the peak months for the domestic market. Guadalajara is the most important market for Puerto Vallarta. They come on weekend using their own cars. (Hotelier, Puerto Vallarta)
- Barranca del Cobre is becoming popular among Mexicans and North Americans. A typical itinerary is a 5-day tour of Los Mochis - Divisadero - Creel - Chihuahua. (Tour operator, Mexico City)

- Peak seasons of the domestic market are Christmas, Easter (Semana Santa), July and August. 5-day trips sell well in the peak seasons, and 3-day trips sell better in off-season. (Tour operator, Mexico City)
- Ixtapa and Puerto Vallarta are popular destinations for Mexican families. Cancun and Los Cabos are special destinations for average Mexicans therefore often chosen for honeymooners. (Tour operator, Mexico City)
- We are introducing bus tours that visit inland historical cities. The selling point of the tours is inexpensive price compared with beach and air packages. Typical itineraries are 1) 4-day tour of Colonial Route: Mexico City - Morelia - Uruapan - Patzcuaro - Janitzio - Mexico, 2) 3-day tour of Independence Route: Mexico City - Querretaro - San Miguel de Allende - Guanajuato - Mexico City, and 3) 7-day tour of Mixtec and Mayan Route: Mexico City - Oaxaca - Tuxtla Gutierrez - San Cristobal de las Casas - Palenque - Villahermosa - Mexico. (Tour operator, Mexico City)
- American enterprises in Mexico often provide incentive travels for their employees. Typical example is to invite an employee with his/her spouse to a beach resort for a ceremony that honors his/her achievement. Length of the itineraries is 4-5 days. Popular destinations are Cancun and Acapulco. (Travel agent, Mexico City)

(2) Comments on Mexican destinations

- Persistent sales of time-share condominium is reported to be a big problem in Puerto Vallarta. A good thing for time-share condo, on the other hand, is that it promotes repeat visits to a destination. (Hotelier, Puerto Vallarta)
- Diving is better in La Paz than in Los Cabos because current is slower. (Tour operator, Mexico City)
- Puerto Vallarta is surpassing Cancun this year. (Wholesaler, Germany)
- Many of the participants in touring of cultural and historical sites are above the 40s. (Tour operator, Mexico City)
- The keyword for our products is "soft adventure." We sell a Cancun-Chichen Itza - Puuc - Campeche - Palenque-Usumacinta river-Chetumal route and cave diving tour near Chetumal. (Wholesaler of ecotourism and diving, Miami)
- We are introducing Belize as a beach and cultural destination. (Wholesaler of ecotourism and diving, Miami)
- We sell a combination of Oaxaca city and Huatulco/Puerto Escondido. 8-9 night holiday composed of 5/6 night sight-seeing in Oaxaca valley and 3/4 night beach holiday at the coast. We provide six tour programs of sight-seeing around the valley and cooking classes. (Wholesaler, Chicago)
- Mazatlan will start promoting "ecotourism circuit" of Mazatlan - La Paz - Topolobampo - Barranca del Cobre. Target market of the tour route would be different from those come to Mazatlan for beaches. (Hotelier, Mazatlan)
- Travel budget for incentive travel is \$1600-1800 per pax. September to December and Feb. - May are the peak seasons. (Travel agent of incentive travel, Chicago)
- Budget per person for incentive travel is \$1000-\$1500. 5 nights is the most selling itinerary for incentive travel. (Travel agent of incentive travel, Chicago)
- Conventions in Mexico are mostly "incentive conventions" in beach resort. Though a large convention center opened in Mexico city, there may not be much demand for conventions. (Hotelier, Mexico City)

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- Incentive tourism is an important market segment for Cancun. Insufficient services of convention bureau and communication infra are the major constraints in beach destinations. (Hotelier, Cancun)
 - Cancun has become so large that "jet-setters" do not fill all the rooms anymore. As a consequence, Cancun has to seek for other types of clientele. "Student market," in particular, of high-school students wreaks havoc in May and June. (Hotelier, Cancun)
 - Cancun's popularity is on the down turn. (Wholesaler, Miami)
 - Singles go to Puerto Vallarta, Mazatlan, and Cancun for nightlife. (Travel agents, Los Angeles)
 - Share of Mexico in beach trips decreased from 80% to 30% over the past decades. (Wholesaler, Miami)
 - Beach is easy to sell as it requires less knowledge and time. Arranging beach trips is easy. (Wholesalers in Los Angeles)
 - Acapulco is reviving due to the efforts to improve its natural environment. (Wholesaler, New York)
 - Beach is easy to sell but profit is thin. (Wholesaler, Chicago)
 - Incentive travel is planned one year prior to the travel. (Travel agent specialized in incentive travel, Chicago)
 - Using charter flights is risky. A few operators stopped using charter flights. (Wholesaler, Chicago)
 - We stopped using charter flights because of thin or minus profit. Consumers get bored of charter destinations. (Wholesaler, Chicago)
 - We shifted business from Mexico to Europe because it is more profitable than selling Mexico. The travel trade in Europe provide special rates in off-season while Mexico does nothing for off-season. In terms of price, Europe is becoming more competitive against Mexico. (Wholesaler, Chicago)
 - The revolution in Cuba triggered the tourism development in Acapulco. Coming back of Cuba to the international tourism market will negatively influence Mexican tourism. (Wholesaler of ecotourism, Miami)
 - Many Americans don't know much about Mexico. (Wholesaler, Los Angeles)
 - Mexico is too close and familiar. (Wholesaler, Los Angeles)

(3) Competitor destinations

- Hawaii, Jamaica, Florida, Las Vegas, Caribbean and cruising are the competitors of Mexico. (Wholesaler, Los Angeles)
- Hawaii, Europe, Caribbean, South Pacific are competitors. (Travel agent, Los Angeles)
- Competitors of Mexico are Jamaica and Hawaii. Jamaica targets at "honey moon" market. 7-night packages to Jamaica costs \$1300-\$1400 while similar products to Mexico cost \$999. (Wholesaler, Chicago)
- Hawaii is the principal competitor of Mexico. Tour prices are between \$400 and \$800 (Travel agent in LA)
- Destinations that fall into the same price range as Puerto Vallarta from Europe are Cancun, Dominica, Margarita (Venezuela), and Thailand. (Tour operator, Puerto Vallarta)

- Since short-haul destinations from Europe are generally expensive, charter flights could make long-haul destinations competitive enough against short-haul destinations. (Tour operator, Puerto Vallarta)
- There was a boom of Cancun in Europe in 1990 but the boom destination has shifted to Cuba. The European market is always looking for a new destination. (Hotelier, Huatulco)
- Carribean cruise is a formidable rival because of competitive price. (Hotelier, Mazatlan)
- USA is the most popular destination of the American continent in Germany (airline company, Mexico City)
- Hotels are cheaper in the USA than in Mexico. (Tour operator of the Japanese market, Mexico City)

(4) Issues and suggestions

a. Strengths of, prospect for, Mexico

- Mexico is suitable for students as it abounds in historical and cultural resources. (Wholesaler specialized in student market and cultural tourism, Chicago)
- Cancun has the best tourist infrastructure and largest accommodation capacity in the Caribbean region. Cancun is a "value" destination. (Wholesaler, Miami)
- Mexico is a natural market for Florida with short distance and inexpensive travel cost. (Wholesaler, Miami)
- Jamaica has good hotels but local people are not very friendly as Mexicans. (Wholesaler, Miami)
- Accessibility, excellent value, safety, friendliness, infra-structure, natural beauty, and culture are the strengths of Mexico. (Wholesaler, New York)
- Views of the sea from hillside could be a selling points of beaches on the Pacific coast. (Wholesaler, Miami)
- Mexico is a inexpensive and short destination. (Wholesaler, Los Angeles)
- Mexico has various possibilities, clean, many English speakers, good services, and climate. (Travel agent, Los Angeles)
- Foods are excellent in Mexico. Tacos is very popular in USA. In addition to this, inexpensive travel cost makes Mexico a popular destination for USA. (Travel agent, Chicago)
- A strength of Mexico is better security and larger capacity than Bahama and Jamaica. (Travel agent/tour operator, Mexico City)

b. Toward tourism diversification

- Many resort areas in Mexico miss the opportunities of convention and incentive market from the lack of golf courses, good restaurants and meeting facilities etc. (Travel agent/wholesaler, Miami)
- "Colonial Cities Program" should learn from New York such as sophisticated restaurants, museums, and entertainment. (Travel agent/wholesaler, Miami)
- Tourism potential in Yucatan and Chiapas in enormous. (Wholesaler of ecotourism, Miami)
- I propose to develop "hacienda tourism" in Mexico targeting at upper market segment. (Wholesaler of ecotourism, Miami)
- In spite of many flights to Mexico City, its tourism potential is not fully exploited. (Wholesaler, Miami)

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- Mexico has potential for ecotourism if SECTUR makes efforts to promote the product. (Wholesaler, Miami)
 - It is difficult to sell "colonial cities" because of the additional cost to reach these cities from gateway airports. (Wholesaler, Miami)
 - Though Mexico abounds in ecotourism resources, very few people have awareness of Mexico as a ecotourism destination (Travel agent, Los Angeles).
 - There is a market segment that prefers small exclusive hotels in the USA. But the opportunity was not properly exploited. (Hotelier, Mexico)
 - There are opportunities other than "beach and ruins" in Mexico. At present, many travel agents don't know how to pronounce "Oaxaca." (Wholesaler, Chicago).
 - Usumacinta river basin has god potential for ecotourism but a serious problem is a poor security condition. Zapatistas do not attack tourists as they know how the world responds if it happens. It is local bandits than attack tourists. (Tour operator of ecotourism and soft adventure, Mexico City)
 - Cancun is intensely promoted in Japan at present but other tourism destinations such as the Bajio area (inland historical cities), Oaxaca, Taxco, and San Cristobal de las Casas are neglected. (Wholesaler, Tokyo)
 - Mexico does not have attractive shopping items for Japanese visitors. They need luxurious but practical items rather than ornaments. The lack could be a constraint to develop the Japanese market. (Hotelier, Mexico City)

c. Tourism promotion activities

- SECTUR should enhance the education on travel agents societies rather than wholesalers. (Wholesaler, Chicago)
- SECTUR should provide slides and videos suitable for consumers in Europe. (Wholesaler, Germany)
- Less bureaucracy for coop projects. (Wholesaler, Germany)
- SECTUR should launch a joint propaganda with wholesalers and airlines. (Wholesaler, Germany)
- SECTUR should conduct tourism promotion toward Paisanos and Mexican Americans.
- Aero Mexico is now very reluctant to cooperate with tour wholesalers as they started selling of their own package tours, which is discouraging us to sell Mexico. (Wholesaler, Miami)
- Lack of cooperation from Mexican airlines. Special low rate offer is too late for the time. (Wholesaler, Germany)
- No cooperation is provided from airlines and SECTUR to produce brochures. (wholesaler/travel agent, Chicago)
- SECTUR needs more investment in advertisement. (Wholesaler, Miami)
- SECTUR must enhance approaches to travel agents rather than wholesalers. (Wholesaler, Miami)
- Coop projects with SECTUR has not been conducted very often but it was done last year. We appreciate Colonial Cities Program"(wholesaler of ecotourism, New York).
- Mexico needs more education of travel agents and consumers (wholesaler, Chicago)

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- Mexico needs to publicize the presence of international chain hotels. Mexico also needs to refute its negative images created by politics, hurricane, Chiapas conflict, and violence (Travel agent, Chicago)
 - Advertisement toward the general public is weak. (Wholesaler, Miami)
 - Products are excellent but the lack of promotion is the weakness of Mexico. (Wholesaler, Los Angeles)
 - Lack of nightlife and advertisement is a weakness of Cozumel. (Wholesaler/agent, Miami)
 - Publicize "Mexico is safe with no hygiene problem. Many people speak English. (Wholesaler, New York)
 - Efforts should be made to increase ""visibility" of Mexico through investment in advertisement. (Wholesaler, Miami)
 - Florida could be combined with Cancun. Joint promotion of the destinations may be possible. (Wholesaler/travel agent, Miami)
 - Internet could be a good promotion tool to reach intellectual people (Wholesaler, Los Angeles).
 - Internet is quite useful to sell products targeted at niche markets.(Wholesaler specialized in ecotourism, Miami)
 - Mexico lacks in practical travel information. They produce beautiful brochures but quantity is always too small. (Airline company, Mexico City)
 - Mass media in Germany often exaggerates political conflicts, uprising Chiapas, and robbery on street. They create an unfavorable image. (Airline company, Mexico City)
 - Tianguis is excessively streamlined for the American market. It is not suitable for tour operators like us that specialize in Latin America and Europe. (Tour operator, Mexico City)
 - We don't participate in Tianguis because buyers come only from the USA. (Tour operator of the Japanese market, Mexico City)
 - SECTUR does not spare much promotion budget for the largest market in the world. Different measures from those for the US market are needed to influence the European market. Mexico's "diversity" is an important point to appeal to the market. (Tour operator, Mexico City)
 - Some visitors from Germany still believe that Mexico is a Malaria-infected country. This wrong understanding should be corrected by SECTUR. (Tour operator of ecotourism and soft adventure, Mexico City)
 - We had difficulty in getting appropriate promotion materials from SECTUR. In particular, town maps of historical cities and beach destinations is important for our Japanese clients. (Tour operator/travel agent, Mexico City)
 - Bali sells more than Mexico in Japan in spite of the fact that Mexico is more clean and sanitary than Bali. It is probably due to the lack of tourism promotion in creating an favorable tourism image. (Tour operator/travel agent, Mexico City)

d. Travel conditions and red tape

- Expensive car rental. (Wholesaler, Germany)
- Mexican consulate in Miami is not very popular among the travel trade as they are not very friendly and slow in processing documents necessary for visitors from Latin America. (Wholesaler/travel agent, Miami)

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- Streamlining of custom procedures is necessary. 20-30% tax on goods brought into Mexico is too expensive (Travel agents of incentive travel, Chicago)
 - Travel conditions (security, road, sanitation), lack of advertisement, and coordination with other ministries are necessary (Wholesaler, New York).
 - Major complaints regarding Mexico are persistent sales of time-sharing condos, overcharging of taxis, inappropriate signs and custom procedures in airports. (Wholesaler, New York)
 - Mexico should improve 1)overbooking of airlines, 2) services at airports, 3) expensive accommodation cost, 4) problems resulting from inadequate quality of drinking water. (Travel agent, Chicago)
 - Domestic transportation is very expensive. (Wholesaler, New York)
 - Government and state authorities change regulations too frequently. It makes difficult to plan tours in well in advance. SECTUR is OK but local customs authorities and fuel commerce department introduced new regulations without any notice. (Wholesaler of ecocruise in Mar de Cortes, New York)
 - Services in Mexico is excellent except airports.(Travel agent, Chicago)
 - Airport custom is always the problem for incentive travel. They often confiscate or charge tax on giveaways and equipment indispensable for the travel. (Travel agent specialized in incentive travel, Chicago)
 - There are problems in customs procedures to bring in video equipment and giveaways. (Travel agent specialized in incentive travel, Chicago)
 - Vendors on the beach is a weakness. (Travel agent, Los Angeles)
 - Street vendors in Acapulco make the destination inappropriate for incentive travel. (Travel agent specialized in incentive travel, Chicago)
 - Number of local German-speaking guides is insufficient. (Wholesaler, Germany)
 - It is difficult to create a tour route due to poor wayside facilities along highways. (Tour operator of the Japanese market, Mexico City)

e. Flights availability

- Lack of direct flights constrains further development of beaches on the Pacific Coast. (Wholesaler, Miami)
- Los Cabos needs direct flights from Miami. It has a favorable image in Miami. (Wholesaler, Miami)
- There is almost no direct flight between Chicago and beaches in Mexico. (Wholesaler of ecotourism, New York)
- Introduction of Chicago-Cancun direct flight is very important to boost the sales of Mexico (Travel agent of incentive travel, Chicago)
- Needs direct flight to Cancun. (Travel agent of incentive travel, Chicago)
- Flights to Mexico by more larger number of airline companies should be introduced. (Wholesaler/travel agent, Chicago)
- Combination of a touring of colonial cities and a stay in Puerto Vallarta is unlikely until direct flights from Latin America to the beach destination are introduced. (Wholesaler, Mexico City)

f. Hotel

- "Good value hotels" are the strength of Mexico. Services and infrastructure are the best in the Caribbean. But its services are not comparable to those in Europe, Thailand and Aruba. (Wholesaler, Miami)

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- Mexico needs improvement of language education for hotel employees (wholesaler, New York)
 - Training of hotel employees is necessary (travel agents of incentive travel, Chicago).
 - Overbooking is often reported in Mexico. In Europe, a rule have been established to cope with the problem: in case of overbooking upper-grade accommodation with complimentary meal must be provided. (Wholesaler, Chicago).
 - Needs development of accommodation between Uxmal and Palenque. (Wholesaler of ecotourism, Miami)
 - Mexico lacks in luxurious hotels in the real sense. It need more golf courses. (Travel agent of incentive travel, Chicago)
 - Hotels in Mexico need standardization of services. In this respect, international hotel chains surpasses Mexican hotels. Consumer protection also needs improvement. (Wholesaler, Puerto Vallarta)
 - Quality of hotels is a weakness of Mexico compared with Dominican Republic. (Wholesaler, Switzerland)
 - Though tourism schools exist in Mexico, they are expensive and tends to lack in systematic education. This may be a cause of poor services in hotels. Mexico should enhance tourism education system through establishment of federal or state educational institutions. (Wholesaler, Tokyo)
 - Slow services at restaurants and lack of variety in foods are major complaints we receive from Japanese clients. (Tour operator, Los Cabos)
 - Services problem in Mexico does not come from the insufficient tourism education system but from the hotel management that does not hire educated staff. (Wholesaler/travel agent, Mexico City)

g. Tourism development policies and concepts

- Ecotourism and soft adventure operators in Mexico are suffering from illegal guides imported from the USA. (Wholesaler of ecotourism and soft adventure, Mexico City)
- Growth rate of Mexico is lower than other long-haul destinations because of less investment in infrastructure. (Wholesaler, Germany)
- A hotel in Los Cabos employed a Japanese gardener. He, unlike others, used desert plants in Baja California for the garden of the hotel. Hence, watering is not necessary and the hotel successfully created a sense of arrival to their guests. (Tour operator, La Paz)
- Limited and orderly development is necessary. Los Cabos is overdeveloped and Cancun is the end! (wholesaler of ecotourism, New York)
- We recommend to introduce a special program for aged people as promoted in Spain and Florida (Travel agent of incentive travel, Chicago).
- Mexico should consider to increase length of stay rather than to increase the number (Wholesaler, Los Angeles)
- Introducing a regulation that enable a stopover at an inland destination with a small extra on the way to a destination could promote trips to inland historical cities (Wholesaler, Los Angeles).
- Mexico should develop family-oriented facilities as it is a "in" concept in the USA corresponding to the life stage of Baby Boomers. (Wholesaler, Miami)
- Attractive smaller beach resort areas are not known to consumers. (Wholesaler, Germany)

- Mexico should invest more on highway, by which tourism in inland historical cities would be stimulated. (Tour operator, Mexico)
- Immigration of artists from the USA revived Todos Santos. They beautified the town employing traditional Mexican techniques and motives. The same scenario would be applicable to other old mining towns in Baja California. (Tour operator, La Paz)
- A combination of Puerto Vallarta and inland historical cities could be make a competitive product. (Travel agent, Puerto Vallarta)

(5) Summary of the mail survey

The following summarizes the result of the mail survey. Out of 22 respondents, 13 are travel agents/wholesaler in Europe and 9 are those in the USA.

a. Composition of market segments

"Vacation" constituted 65% of the tourism to Mexico handled by the respondents. Shares of "incentive" and "conference" are higher in the USA.

Table A.1. 9 Composition of tourism demand

	Total	Europe	USA
Vacation	65%	76%	51%
Incentive	8%	4%	14%
Conference	6%	1%	13%
Business trip	3%	1%	5%
Others	8%	17%	17%

Source: JICA Study Team

b. Types of organized tours to Mexico

Beach-only packaged holidays constituted 48% of the total, while pure touring type and beach and touring types constituted 18% and 27%, respectively. Percentage of beach and touring type was higher in Europe than USA, reflecting its better holiday entitlement than that of the USA.

Table A.1. 10 Type of package tours handled

	Total	Europe	USA
Beach	48%	50%	45%
Touring	18%	17%	19%
Beach and touring	27%	33%	19%
Cruise	1%	1%	0%
Others	7%	0%	16%

Source: JICA Study Team

c. Length of the most selling tour itinerary to Mexico

The average length of the most popular itinerary was 9.7 nights. There is a considerable difference in the length of travel itinerary. Europe was 13.3 nights while USA was only 5.7 nights.

d. Importance of tourism products in Mexico

The travel trade both in the USA and Europe agreed that "beaches" was the most important tourism product of Mexico. Europe, however, placed more importance on "archaeological sites" and "indigenous cultures" than the USA, while USA placed more importance on "food," "shopping" and "activities" than Europe. This probably reflects the differences between the long-haul market and the short-haul market.

Table A.1. 11 Importance score of tourism elements

	Total	Europe	USA
Beaches	3.7	3.7	3.7
Archaeological sites	3.5	3.6	3.4
Food	3.3	3.1	3.7
Indigenous cultures	3.3	3.3	3.2
Shopping	3.0	2.7	3.4
Entertainment	2.9	2.6	3.2
Colonial towns	2.8	2.9	2.7
Activities	2.8	2.5	3.2
Nature & wildlife	2.7	2.8	2.7
Cruise	1.9	2.1	1.7

Note: Importance score: 1= not important, 4=very important

Source: JICA Study Team

e. Obstacles to sell Mexico

One third of the respondents gave "expensive international airfare" as the obstacle to sell tours to Mexico. It was followed by "poor market awareness" and "expensive domestic transportation cost." The percentage of respondents in Europe who gave "expensive domestic transportation cost" was higher (31%) than that of the USA.

Table A.1. 12 Obstacles to sell Mexico

	Total	Europe	USA
International airfare	33%	38%	25%
Market awareness	29%	23%	38%
Domestic transport	24%	31%	13%
Expensive accommodation	19%	23%	13%
Poor services	19%	15%	25%
Suitable accommodation	10%	8%	13%
Resort areas	5%	0%	13%
Tourism objectives	5%	0%	13%
Security	5%	8%	0%
Others	14%	0%	38%

Source: JICA Study Team

f. Competitor destinations

"Caribbean islands" was the destination that was the most widely recognized as the competitor of Mexico's beach resort tourism. It is followed by Asian countries and Hawaii. All respondents that gave Asia as a competitor were based in Europe.

Guatemala in the field of cultural tourism, Costa Rica in the field of ecotourism, Caribbean in the field of cruise, and USA in the field of incentive tourism, were regarded as major competitors of Mexico.

Table A.1. 13 Competitor destinations of Mexico

Market segment	Destinations
Beach resort tourism	Caribbean (16), Asia (6), Hawaii (4), Costa Rica (2), Florida (2)
Cultural Tourism	Guatemala (3), Peru (2), Brazil (2), Egypt (2), Costa Rica (2)
Ecotourism	Costa Rica (6)
Cruise	Caribbean (4)
Incentive	USA (3), Caribbean (2), Europe

Note: Destinations that have more than two responses are listed.

Source: JICA Study Team

Strengths of Mexico were in regard to its geographical advantage (i.e. accessibility, cost, airline connection), variety of tourism resources (i.e. history, colonial atmosphere) and tourism facility and infrastructure (i.e. deluxe resort, better developed area), and hospitality (i.e. friendly people).

Most of the weaknesses of Mexico were centered on insufficient tourism promotion and negative images deriving from it (i.e. market awareness, negative press) and quality of hotels and its services.

g. Evaluation of SECTUR's tourism promotion activities

"Familiarization trip for the media" was the promotion activity that was given the highest score for improvement. The score was especially high (3.8 point) in the USA. It is followed by "Familiarization trip for the travel trade," "advertisement for consumers," and "joint promotion." "Internet" was given the second highest score in the USA.

Table A.1. 14 Improvement score of SECTUR's promotion activities

	Total	Europe	USA
Fam trip for the media	3.2	3.0	3.8
Fam trip for the travel trade	3.1	3.1	3.0
Ad for consumers	2.9	2.9	3.0
Joint promotion	2.8	2.8	2.7
Internet	2.8	2.5	3.3
Slide/video presentation	2.7	2.4	3.1
Ad on trade magazine	2.6	2.5	2.8
Brochures	2.6	2.5	2.8
Display material	2.6	2.3	3.0
Newsletters	2.5	2.0	3.3
Public relation	2.5	2.0	3.1
Maps	2.3	2.5	2.0
Sales manual	2.2	2.1	2.3
Training program	2.1	2.0	2.1
Sales calls	2.0	1.3	2.9
Trade shows	1.9	1.8	2.1

Source: JICA Study Team

A.1.2.4. Survey sheet for mail survey

Q1. Please provide information on the numbers of passengers which you have booked to Mexico.

1990	1991	1992	1993	1994	1995
()	()	()	()	()	()

Q2. Please provide a breakdown of types of tourism for Mexico

1. Vacation	()%
2. Incentive	()%
3. Conference and convention	()%
4. Business trip	()%
5. Others (please specify)	()%

Q3. Please provide a breakdown of types of itineraries for Mexico.

1. Purely beach resort type ()%
2. Purely touring type ()%
3. Combined beach and touring type ()%
4. Cruise ()%
5. Others (please specify) ()%

Q4, How long is your best selling tour itinerary to Mexico?

() nights

Q5. What is your marketing approach to promote tourism to Mexico?

Please elaborate on the "image" and "sales points" which you are employing in your marketing activities.

()

Q6. How do you rate the importance of following aspects of Mexican tourism, when you plan your Mexican products?

	Not important	A little important	Important	Very important	I don't know
Beaches	1	2	3	4	5
Nature and wildlife	1	2	3	4	5
Archaeological sites	1	2	3	4	5
Quaint colonial towns	1	2	3	4	5
Indigenous people & cultures	1	2	3	4	5
Cruise	1	2	3	4	5
Sports activities	1	2	3	4	5
Entertainment and night life	1	2	3	4	5
Local food	1	2	3	4	5
Shopping	1	2	3	4	5

If you identify any other market opportunities, please specify.

()

Q7. What are the constraints for selling Mexico to your customers? (please choose all that apply)

1. Expensive international airfare
2. Expensive transportation cost within Mexico
3. Expensive accommodation cost
4. Lack of accommodation that suit your customers' preference
5. Lack of attractive resort areas
6. Lack of attractive tourism objectives
7. Poor or/and inadequate services provided by tourism related establishments
8. Poor security condition
9. Poor market awareness of Mexico as a tourist destination
10. Others - please specify

()

Q8. With which destinations is Mexico directly competing in the following market segments? What are the strengths and weaknesses of Mexico compared to the competitors?

Beach resort tourism

Competitor _____

Strengths of Mexico _____

Weaknesses of Mexico _____

Cultural tourism (archaeological sites, quaint historical towns etc.)

Competitor _____

Strengths of Mexico _____

Weaknesses of Mexico _____

Ecotourism (whale watching, bird watching etc.)

Competitor _____

Strengths of Mexico _____

Weaknesses of Mexico _____

Cruise

Competitor _____

Strengths of Mexico _____

Weaknesses of Mexico _____

Incentive travel

Competitor _____

Strengths of Mexico _____

Weaknesses of Mexico _____

Q9. How do you rate the necessity of improvement for the following services provided by Mexican government tourist office?

	No needs for improvement	A little needs for improvement	Needs improvement	Strong needs for improvement	I don't know
Newsletters	1	2	3	4	5
Advertisement on travel trade magazines	1	2	3	4	5
Advertisement toward consumers	1	2	3	4	5
Familiarization visits for the travel trade	1	2	3	4	5
Familiarization visits for journalists	1	2	3	4	5
Slide/video presentation & lectures	1	2	3	4	5
Joint promotions with the travel trade	1	2	3	4	5
Personal sales calls and meeting	1	2	3	4	5
Point of sale and display material	1	2	3	4	5
Brochures	1	2	3	4	5
Maps	1	2	3	4	5
Sales manuals / information material	1	2	3	4	5
Trade shows	1	2	3	4	5
Training program	1	2	3	4	5
Public relation	1	2	3	4	5
Internet	1	2	3	4	5

Q10. If you have any remarks and suggestions for the services provided by Mexican government tourist offices (SECTUR), please let us know.

()

Q11. If you notice any changes in consumer's attitude toward travel and leisure time utilization that could influence Mexican tourism, please let us know.

()

Q12. If you notice any changes in your customers' preference for destinations in Mexico, please let us know.

()

Q13. If you have any remarks and suggestions for increasing sales of trips to Mexico, please let us know.

()

Please provide information about your company.

Q14. Type of your business

1. Retailer (travel agency)
2. Wholesaler
3. Tour operator
4. Other (please specify _____)

Q15. If your company specializes in any market segment(s), please specify

(_____)

Q16. Total number of passengers you booked in the latest fiscal year

(_____) persons

Q17. Location of the head office of your company

Country (_____), City (_____)

Q18. Number of branch offices

(_____) branches

Q19. Total number of employees

(_____) persons

Thank you very much for your kind cooperation in sparing time for answering the questions.