




COMPENDIUM OF TOURISM STATISTICS OF THE SICA REGION 2019





©Compendium of Tourism Statistics
elaborated by the Secretariat for Central
American Tourism Integration (SITCA)
Management: Ilka Aguilar Valle
Compilation of content: Nelson Joaquín
Salazar Recinos y Katherine Vado Rivera
Drafting and estimates: Nelson Joaquín
Salazar Recinos y Katherine Vado Rivera
Statistical data: Tourism authorities of the
SICA member countries, Statistics Committee,
Central Banks

Photography: National Tourism Authorities
(NTA), Flickr ©CC
Translation into English: Massiel Parrales
Campos

Managua, Nicaragua
Website: www.sitca.info
Social media: [sitca_turismo](https://www.facebook.com/sitca_turismo)
www.visitcentroamerica.com

Compendium of Tourism Statistics Of The SICA Member Countries 2019

Belize – Costa Rica – El Salvador – Guatemala – Honduras
Nicaragua – Panama – Dominican Republic

CHAPTER I: INTRODUCTION	01
CHAPTER II: GENERALITIES	03
2.1 The Secretariat for Central American Tourism Integration (SITCA)	
2.2 Central American Tourism Council (CCT)	
CHAPTER III: WORLD TOURISM	06
3.1 Tourist arrivals in the world	
3.2 Tourist arrivals per region	
CHAPTER IV: TOURISM IN SICA MEMBER COUNTRIES	10
4.1 Inbound tourism	11
4.1.1 Visitors, tourists, and excursionists' arrivals	
4.1.2 Cruise and cruise passengers' arrivals.	
4.1.3 Tourist arrivals by region and country of origin	
4.1.4 Tourist arrivals by route of entry	
4.1.5 Travel motivation for inbound tourism trips	
4.1.6 Average daily expenditure	
4.1.7 Average nightly stay	

4.2 Outbound tourism 30

- 4.2.1. Tourist departures
- 4.2.2. Departure routes of outbound tourism
- 4.2.3. Travel motivation for outbound tourism travel

4.3 Touristic offer 33

4.3.1. Accommodations

- 4.3.1.1 Number of Establishments
- 4.3.1.2. Number of Rooms
- 4.3.1.3. Number of Beds
- 4.3.1.4. Hotel occupancy

4.3.2. Travel Agencies

CHAPTER V: ECONOMIC DATA 40

5.1 Revenues generated from tourism

5.2 Closing comments

CAPÍTULO VI. ANEXOS

6.1 Glossary



I. PRESENTATION

SITCA

SECRETARÍA DE INTEGRACIÓN
TURÍSTICA CENTROAMERICANA



Ilka Aguilar Valle
SITCA Executive Secretary

The Central American Tourism Council (CCT), through the Secretariat for Central American Tourism Integration (SITCA), recognizes that the activities derived from tourism services are an essential source of employment and foreign exchange for the countries of the SICA region, making the sector a booster of local economies, serving as a cornerstone for the entire value chain, making tourism a platform for growth and dynamization of the countries' economies.

The Compendium of Tourism Statistics 2019 is a synthesis of the tourism sector's performance, built thanks to the National Tourism Administrations (ANT) contributions of Belize, Costa Rica; El Salvador; Guatemala; Honduras; Nicaragua; Panama, and the Dominican Republic. This document systematizes the statistics from a regional perspective to provide the reader with a consolidated vision of the tourism sector, providing inputs to support the design, planning, and execution of actions that foster innovation, promotion, growth, and modernization of models of sustainable tourism at the national and regional level.

The Secretariat for Central American Tourism Integration (SITCA) makes this analytical and infographic instrument available to the general public to contribute in a timely manner to discuss the most relevant elements of the tourism sector in the member countries of the SICA region.



II. GENERALITIES OF THE SECRETARIAT FOR CENTRAL AMERICAN TOURISM INTEGRATION (SITCA)

SITCA

SECRETARÍA DE INTEGRACIÓN
TURÍSTICA CENTROAMERICANA



The Secretariat for Central American Tourism Integration (SITCA) is the permanent regional office of the CCT and serves as the Council's operational body on issues of integration and tourism competitiveness. Its main function is to follow up on presidential mandates on tourism and the Council's agreements, with the aim to contribute to the Council's objectives.

SITCA was officially created like the CCT, through Resolution VI of the First Extraordinary Conference of Ministers of Foreign Affairs of Central America, held in San Salvador, El Salvador, from March 29th to April 2nd, 1965. Subsequently, During the XLI Ordinary Meeting, the heads of state and government of the SICA countries, held on June 27th, 2013, agreed that the SITCA headquarters would be reinstalled to Nicaragua in the second half of 2013, where the secretariat's seats remain.

► Background

In February 1965, an informal meeting of Central American Ministers of Foreign Affairs established the "Convention for the Unification of Central American Standards for the Promotion of Tourism", in which the Secretariat for Central American Tourism Integration was established for the first time as the official regional tourism body to promote and encourage the development of tourism in the area, and with broad powers to manage the support of governments, and banking and financial institutions to achieve this objective. In the referred agreement its purpose, functions, assets and general dispositions were established.

In 1965, during the 1st Extraordinary Conference of Ministers of Foreign Affairs of Central America, held in San Salvador from March 29 to April 2, it was established by the VI resolution that the CCT would have a permanent office to be called the Secretariat for Central American Tourism Integration

(SITCA). Also, that it would have its permanent headquarters in the city of Managua, Republic of Nicaragua.

After 26 years in Nicaragua, following the orientation of the 1st Extraordinary Conference of Ministers of Foreign Affairs, SITCA moved its headquarters to the building of the General Secretariat of the Central American Integration System, where for many years served as the Directorate of Tourism of the General Secretariat of SICA (DITUR/SG-SICA) and the Technical Secretariat of the CCT (ST-CCT). It is in the period 2013-2014 when its original headquarters were reinstalled in the city of Managua-Nicaragua, where it is currently located.

► Central American Tourism Council (CCT)

The Central American Tourism Council (CCT) was created as an organ of the Organization of Central American States (“ODECA” acronym for its Spanish equivalent) following the VI resolution of the First Extraordinary Conference of Ministers of Foreign Affairs of Central America, held in San Salvador. At the aforementioned conference, the Secretariat of Central American Tourism Integration (SITCA) was created to be governed by regulations to be prepared by the CCT.

The regulations were approved by the Executive Council of ODECA at the First Ordinary Conference of Ministers of Foreign Affairs of Central America held in Guatemala from October 25th 1965 - October 30th 1965, and SITCA regulations were approved at the third extraordinary session of the CCT on December 6th 1965 - December 7th 1965 in Managua, Nicaragua. The document was revised and approved before the Council with its modification during its LXXI ordinary session on January 11th, 2008.



CCT Objectives

- To facilitate and stimulate the development of tourism throughout the Central American
- To seek to remove all obstacles and impediments to the free movement of people in the region.
- To integrate the promotion of tourism as a priority state action in relation to other functions of the different government departments and agencies, both at the national and regional level, so the efforts concerning the development of tourism in Central America are effectively carried out.



III: WORLD TOURISM

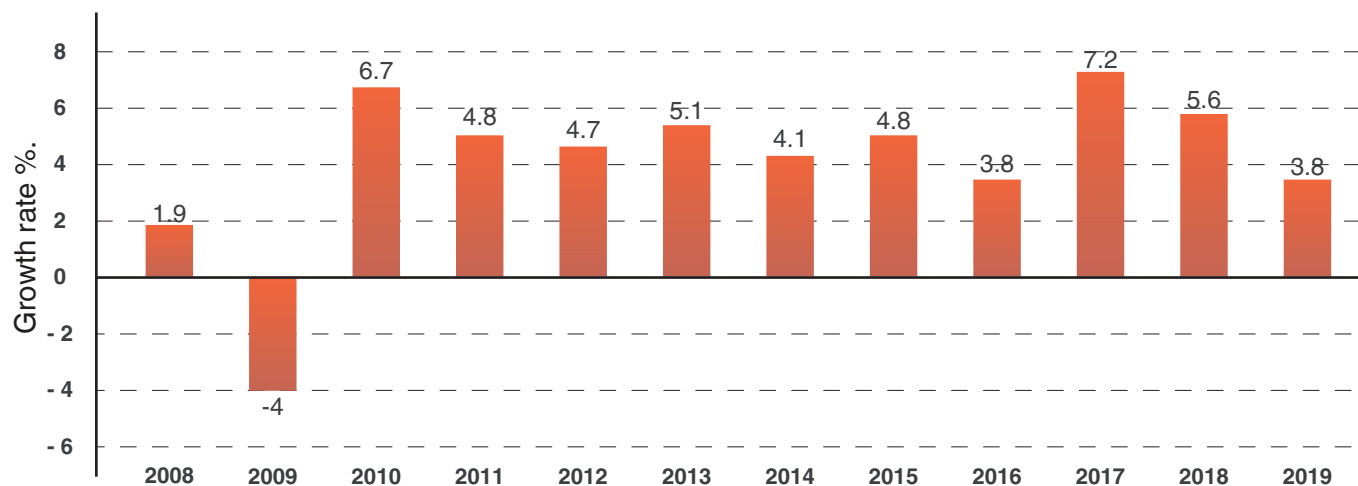
► Section 3.1. Tourist arrivals in the world¹

International tourist arrivals worldwide in 2019 grew by 4%, reaching 1.5 billion people, nearly 54 million more than the previous year. Although the growth in tourist arrivals was positive, it is modest compared to 2017 and 2018, with 7% and 6% respectively. In this sense, the World Tourism Organization (UNWTO) comments that the lower performance in 2019 was due to lower demand for tourism services in advanced economies, mainly in Europe. In Europe, the year 2019 was marked by an environment of uncertainty around the Brexit issue, by geopolitical and commercial tensions, by low global economic growth, and finally the collapse of the emblematic British tourist travel company Thomas Cook in addition to the bankruptcy of a group of low-cost European airlines consolidating a turbulent process that began in 2017 with the bankruptcy of large airlines such as Air Berlin and Monarch Airlines, among others.

2019: The end of an era / The end of a decade of continuous growth

Figure 3.1: International tourist arrivals worldwide

Growth rate (%)



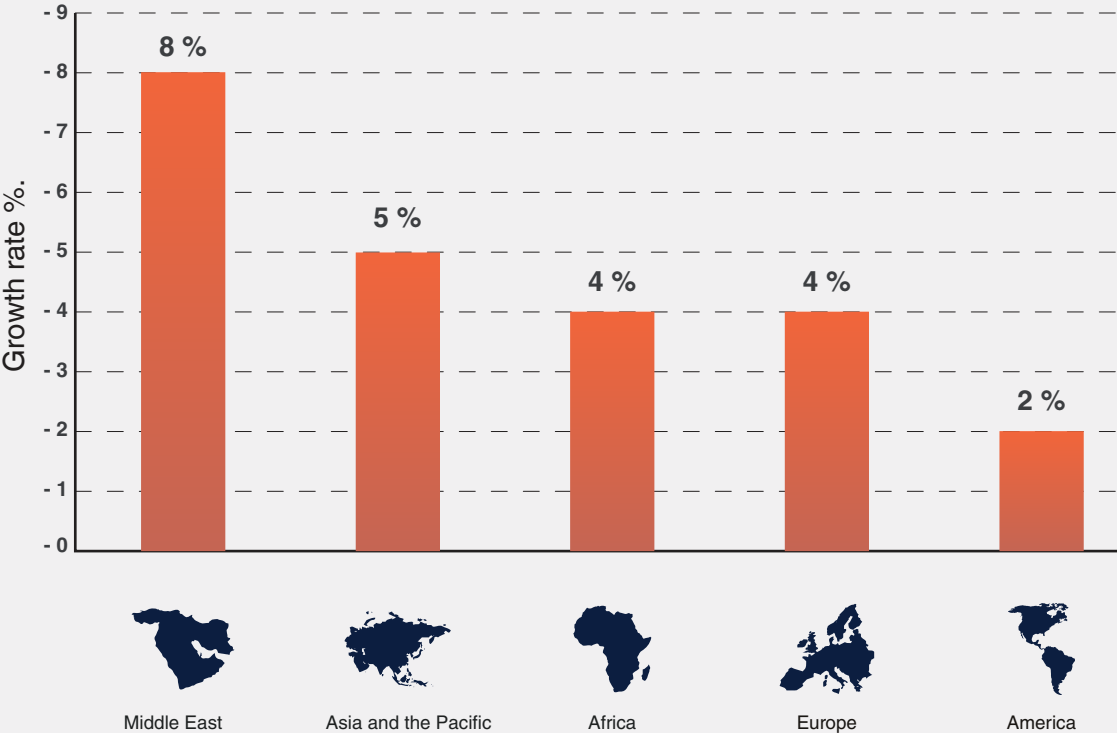
Source: World Tourism Barometer – January 2020

¹Billions = Billions

► Section 3.2. Tourist arrivals per region

In regional terms, the growth of international tourist arrivals in 2019 had the following composition: In the Middle East, arrivals grew 8%; in Asia and the Pacific, they grew 5%; in Africa and Europe, the growth was 4%, and in the American continent, it was 2%. In line with the above, it is essential to note that the global growth of tourist arrivals in 2019 of 3.8% was higher than the growth of the global economy of 3% (UNWTO (a), 2020).

Figure 3.2: International tourist arrivals by región
Growth rate (%)



Sources: World Tourism Barometer – January 2020

At the sub-regional level, growth in international tourist arrivals was led in 2019 by North Africa with 9%; followed by Southeast Asia with 8%; in the third position, the southern and Mediterranean regions of Europe and the Caribbean sub-regions registered a growth of 5%. Within the American continent, international tourist arrivals' growth was impacted downwards by a contraction of international tourist arrivals in South America of -3.1%. In comparison, North and Central America registered growth rates of 2.8% and 2.2 %, respectively. In 2019 South America was the only region globally that reported a negative rate of growth in its international tourist arrivals (UNWTO (a), 2020).

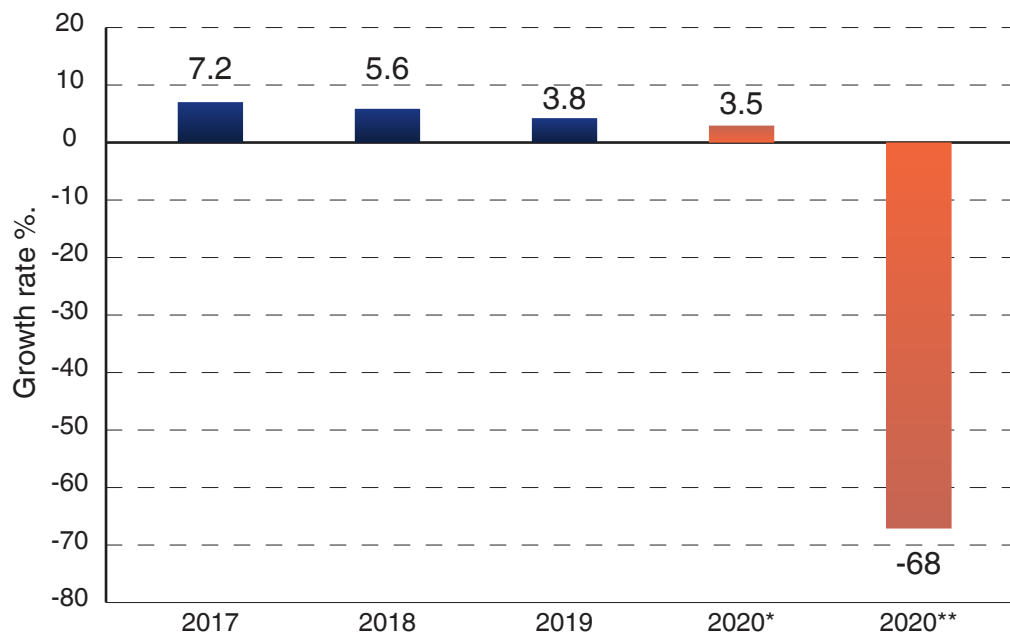
► Section 3.3. Prospects for 2020

The most significant determinant of tourism activity worldwide for the year 2020 is the emergence of the global scene of the disease called Covid-19, caused by the SARS-CoV-2 virus of the coronavirus family. The first case of atypical pneumonia was reported to the World Health Organization (WHO) country office in China on December 31st, 2019. Since then, the Covid-19 disease has spread around the globe as a voracious forest fire, declaring itself a Public Health Emergency of international scope on January 30th, 2020 and reaching at least 212 countries, 32.7 million confirmed cases and 991,000 deaths as of September 27th, 2020 (WHO, 2020), far exceeding the SARS outbreak of the early 2000s and becoming the worst pandemic of the 21st century to date.

2019: The end of an era / The end of a decade of continuous growth

Figure 3.3: International tourist arrivals worldwide

Growth rate (%)



Sources: World Tourism Barometer – January 2020; UNWTO World Tourism Barometer, May 2020 – Special focus on the Impact of COVID-19

* Forecast made in January 2020

**Forecast update made in May 2020 (Fall of between 58% - 78%)

Because the primary containment strategy for Covid-19 is social distancing, tourism activities and accessory activities have been strongly affected during 2020. The abrupt cessation of air travel cut off the demand for Central American tourist services from foreign citizens, mainly from the United States and Europe, and at the same time, the measures of social distancing put a halt to the mobilization of people within the national territories, halting on the spot the local demand for tourist activities. Consequently, when internal and external demands for tourism services suddenly contract, the industry is expected to experience the most severe contraction in its history.



IV: TOURISM IN SICA MEMBER COUNTRIES

► 4.1 Inbound tourism



VISITOR

A visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited (IRTS 2008, 2.9). A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) (OMT, 2018).



TOURIST

A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) (OMT, 2018).

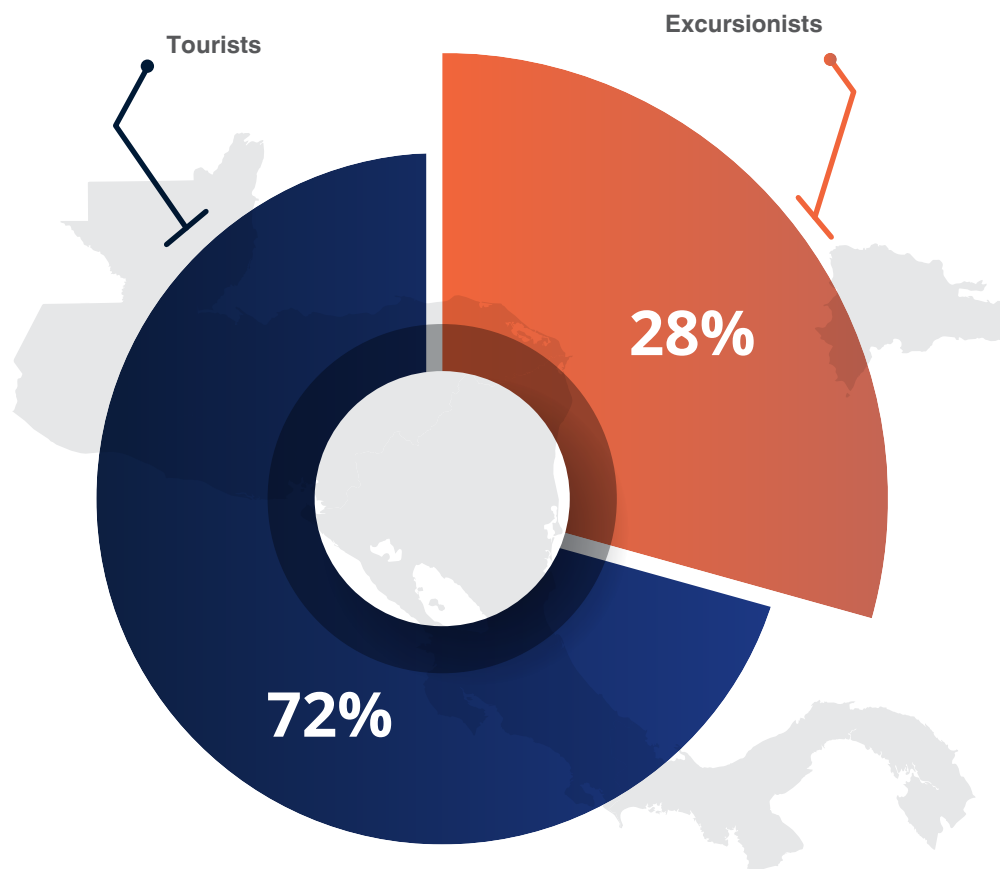


EXCURSIONIST

It refers to the visitor who does not spend the night at their destination, they are also known as same-day visitors.

4.1.1. Visitors, tourists, and excursionist' arrivals

Graph 1: Distribution of total visitors in the SICA region
Percentage of total Year 2019



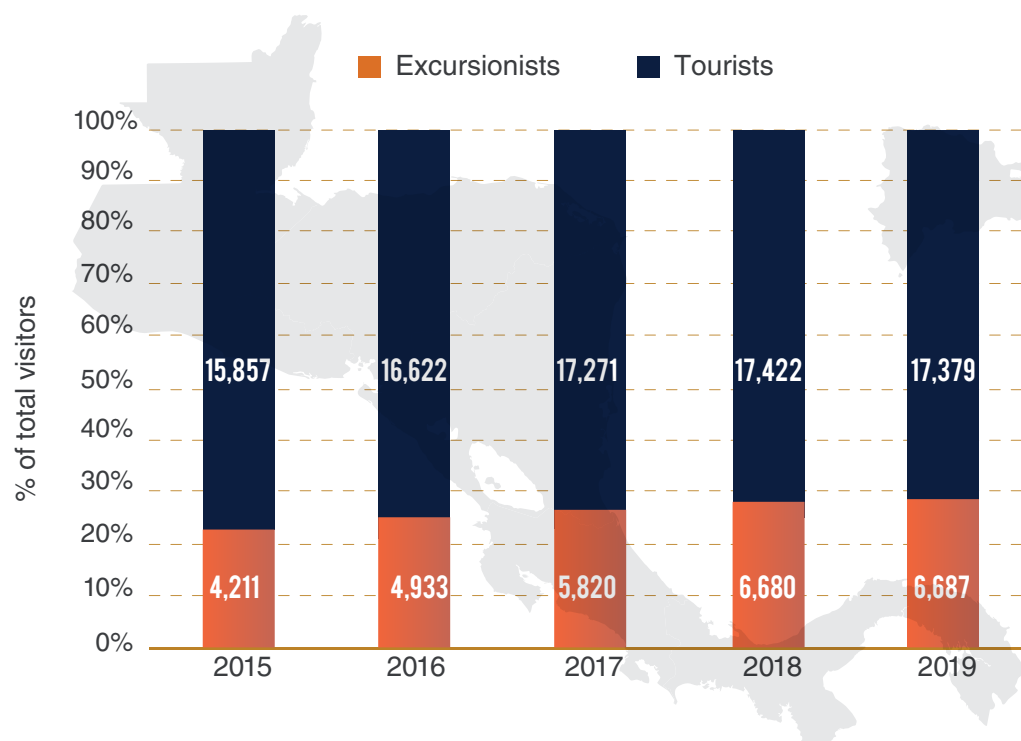
Between 2015 and 2019, in the SICA² region countries, the average growth rate of visitor arrivals was 4.9%, where only in 2019, there was a negative rate of -0.2%. In 2019, a total of 24.065³ million visitors were received, 36 thousand less than the previous year. However, the composition of visitors was maintained compared to 2018, where 72% of visitors were tourists, and 28% were excursionists⁴. On the other hand, tourist arrivals fell -0.2% in 2019, while hiker arrivals grew by a modest 0.1%.

²Member countries of the Central American Integration System (SICA): Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama, and the Dominican Republic.

³Subject data to variation according to the 2019 data update for the Republic of Honduras

⁴Total trekkers does not include cruise ship passengers or cruise passengers

**Graph 2: Percentage structure of visitors
SICA Region 2015 – 2019**



Excursionists: As previously mentioned, in 2019, excursionist's arrivals fell by -1.21%, which represents a significant change; after that, in 2016, 2017, and 2018 this variable grew by more than 10% each year.

Tourists: In the tourists' case, the fall registered in 2019 consolidates a downward trend of this variable since 2015. Although the SICA region received Between 2015 - 2018 a more significant number of tourists each year, the interannual variation was less and less, until registering in 2019 a lower number than the previous year.

The drop in tourist arrivals is mainly explained by the lower demand for tourist services in advanced economies, mostly in Europe. About 13.7% of the total tourists arriving in the SICA region come from Europe, and in 2019 tourists from Europe registered a contraction of -3%. Tourists from

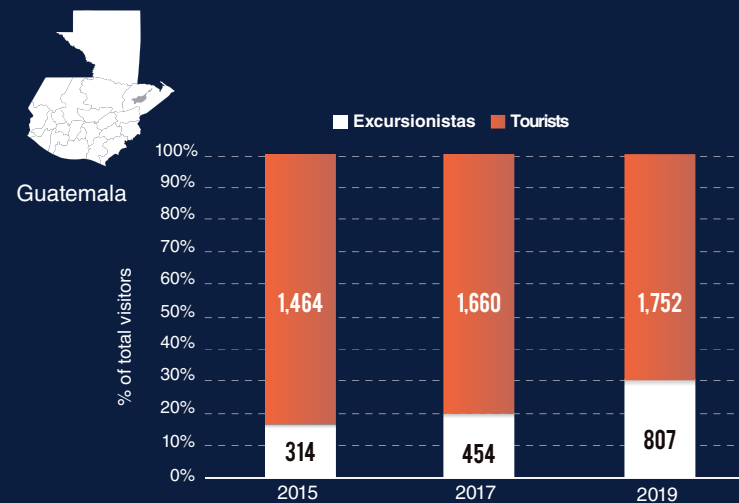
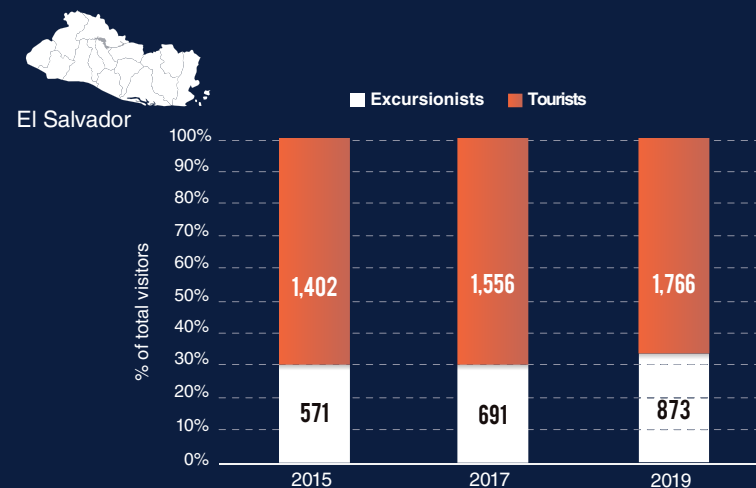
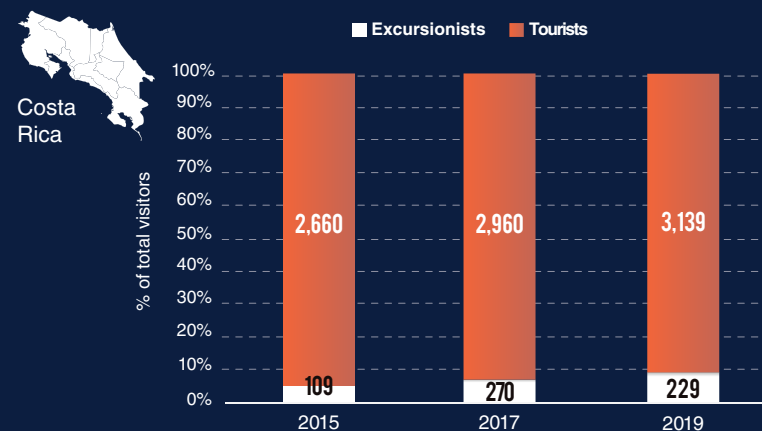
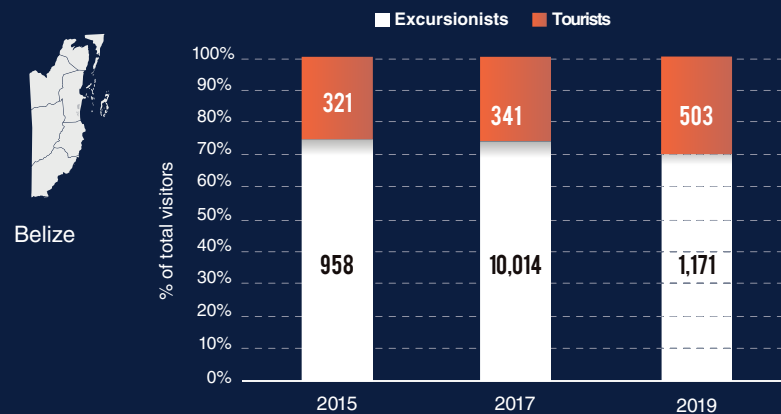
Central America, representing about 23% of total tourists, also reported a contraction of -2%. On the other hand, in this same context, contractions in tourist arrivals from South America and Asia were registered, with falls of -5% and -20% respectively. Tourists from North America registered a slight fall of -0.3%, and tourists from the Caribbean showed a positive variation rate of 17%. In the case of tourists from North America, they represent a little more than 43% of the total tourists, and tourists from the Caribbean represent only 8.4% of the total tourists.

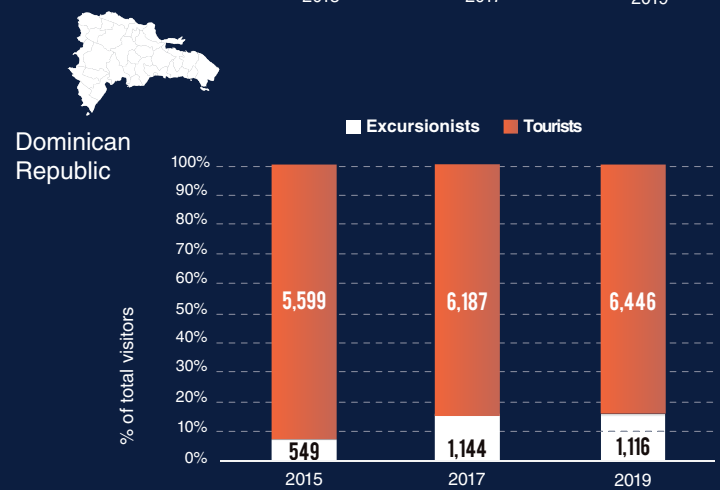
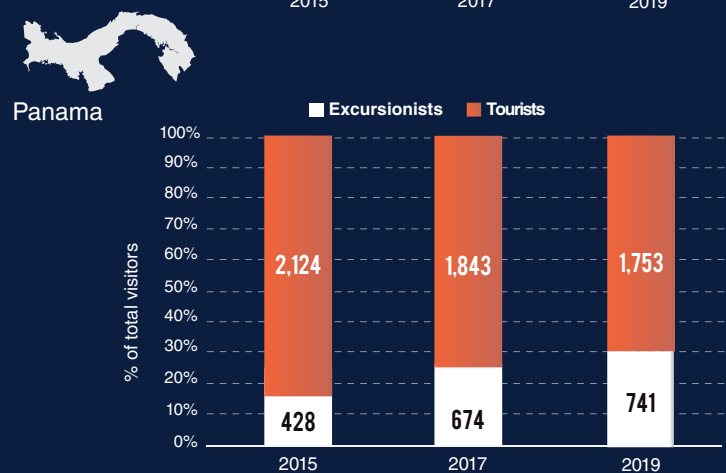
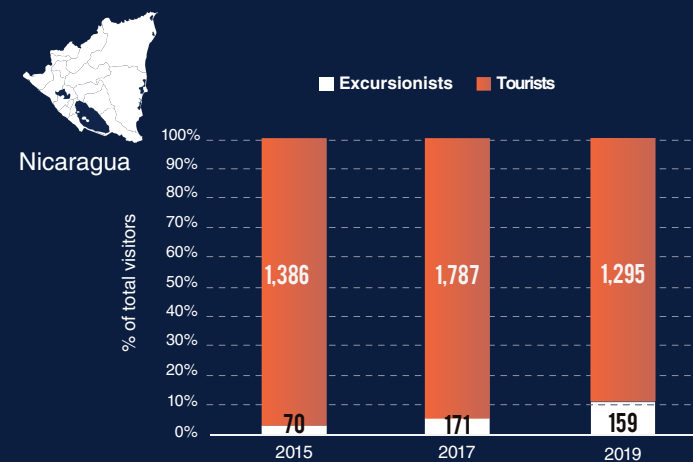
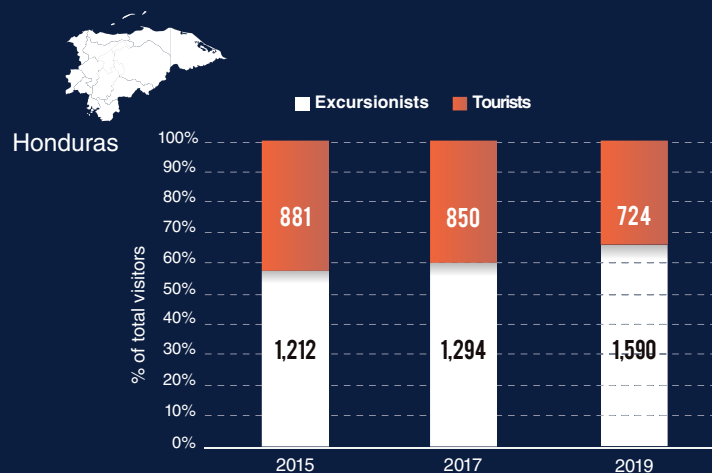
Graph 3: Interannual growth of visitors
Variation percentage (%)
2015 – 2019



Geopolitical events on the world scene marked the general trend of visitor arrivals in 2015 - 2019. The economic and political stress of the main markets of origin of the visitors, such as North America and Europe, largely conditions the SICA region trends. As for SICA member countries' sub-regional dynamics, during 2018, several of the region's countries implemented tax reforms that shook their local economies and ultimately generated a negative image by directly impacting perceived visitor levels.

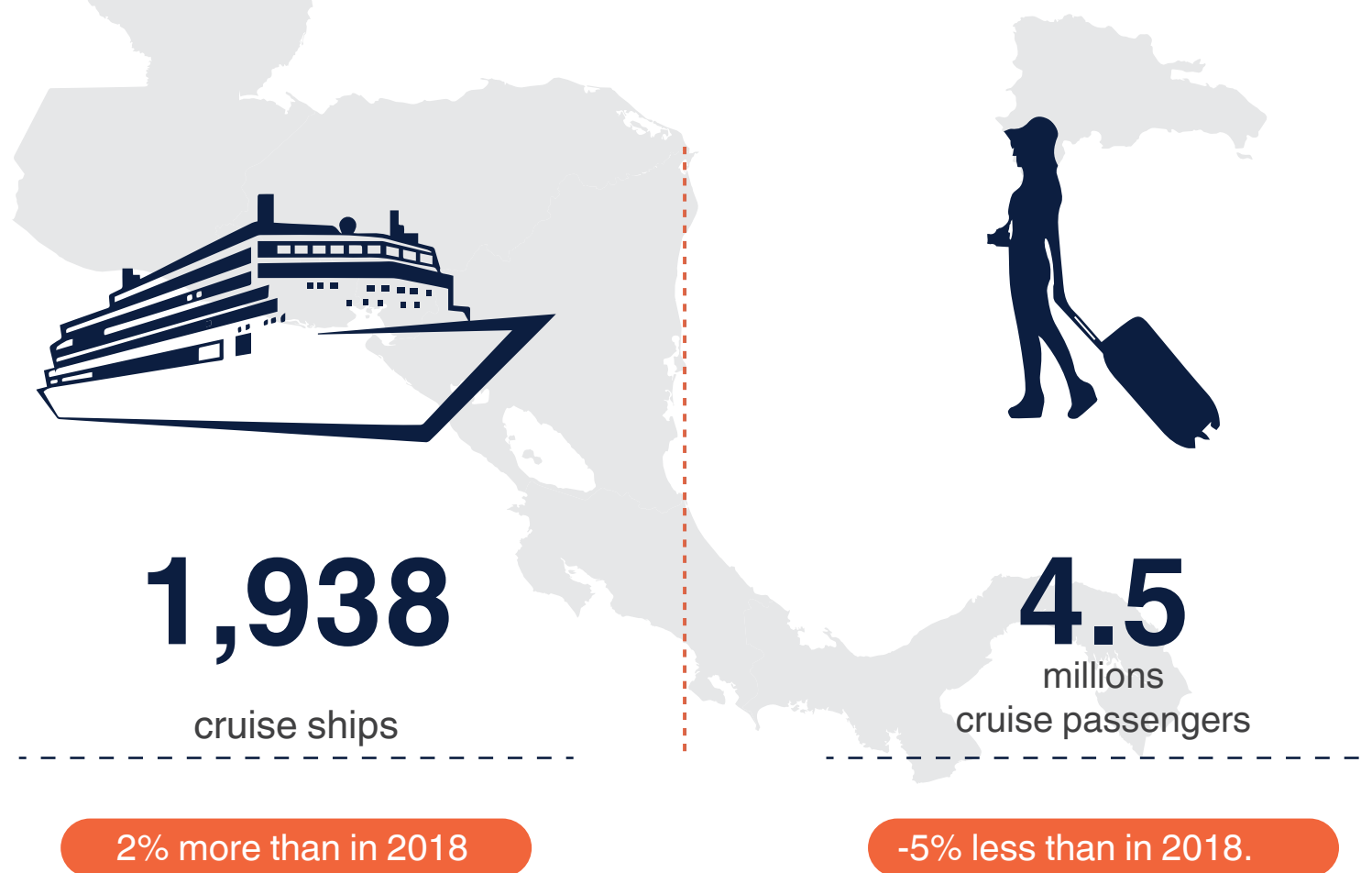
Figure 4: Visitor structure by country
Thousands of people 2015 – 2019



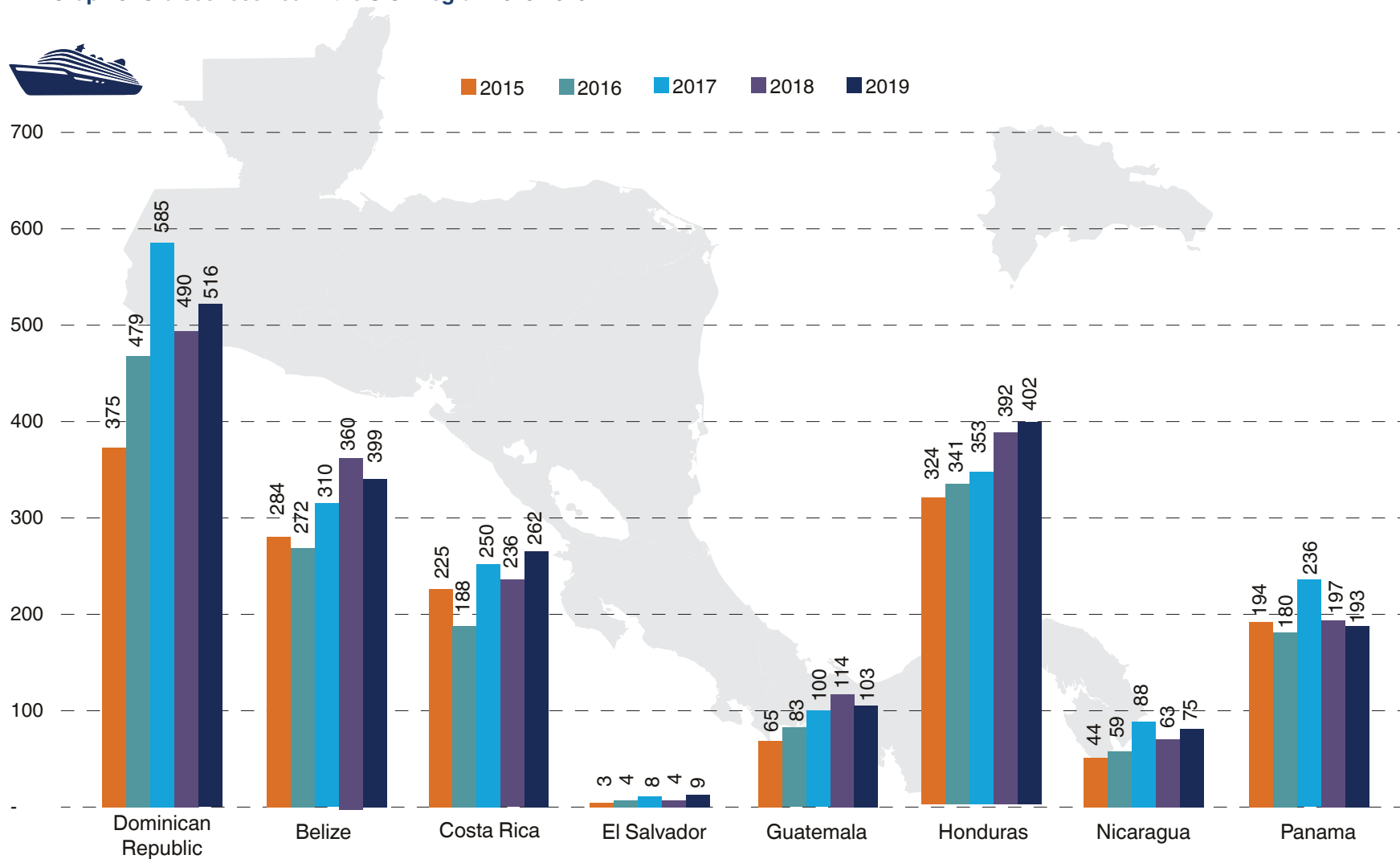


► 4.1.2. Arrival of Cruise and Cruise passengers

In 2019 the SICA region received approximately 1,938 cruises, 2% more than in 2018. This activity resulted in the arrival of 4.5 million cruise passengers, 256 thousand less than the previous year, or -5% less than in 2018.

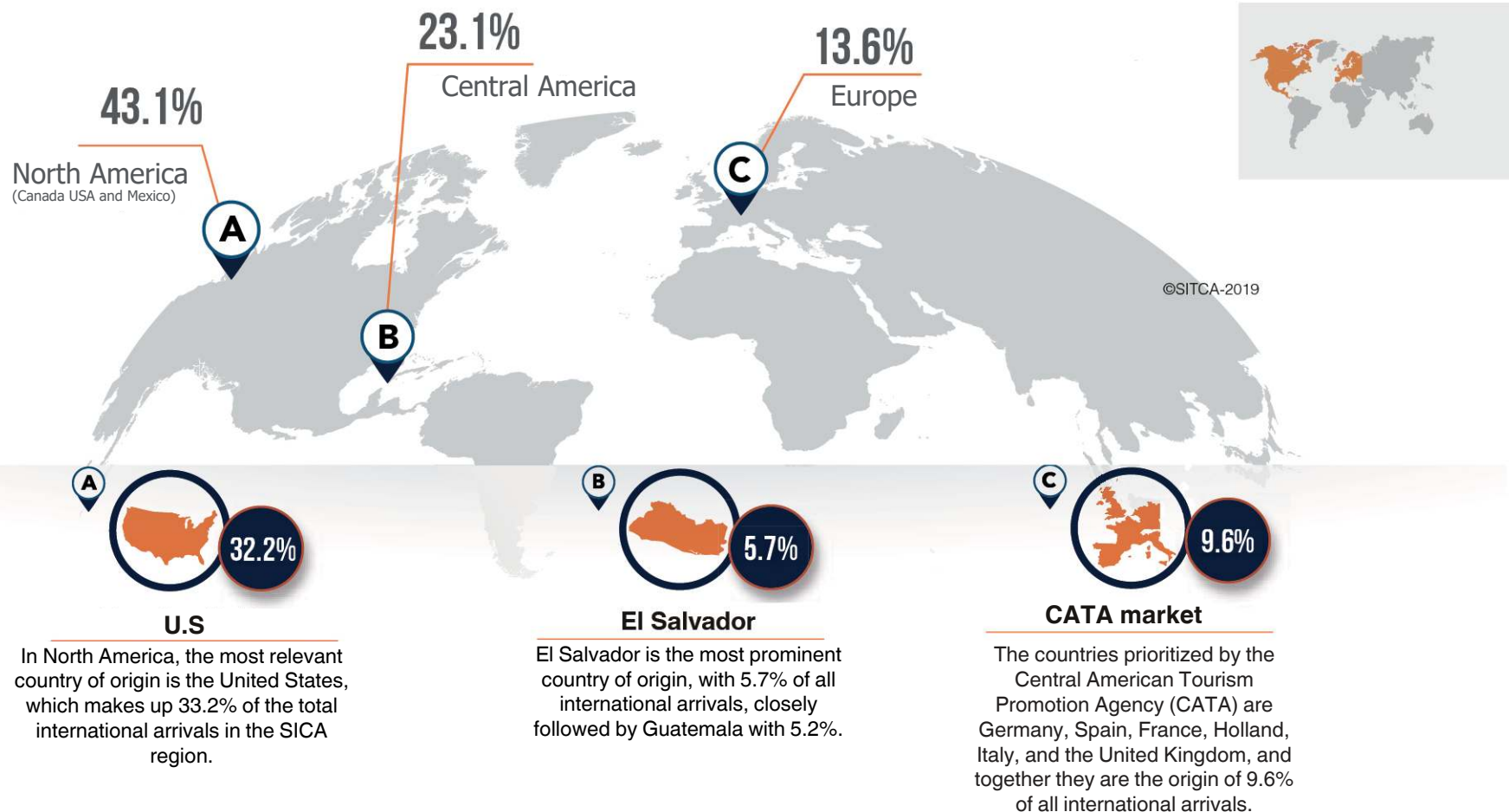


Graph 5: Cruises received in the SICA region 2015-2019



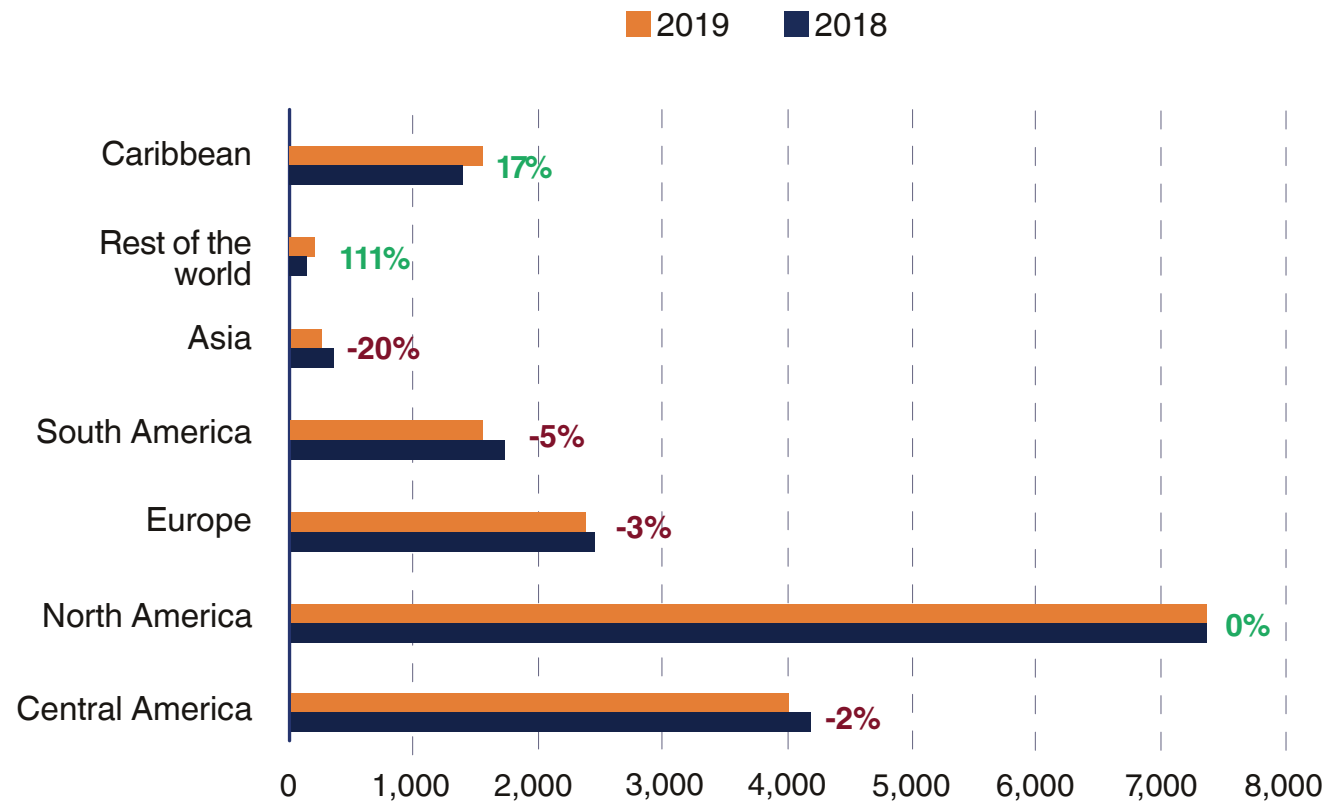
4.1.3. Tourist arrivals by geographical region and country of origin

In 2019 the region received 17,381 million tourists⁵. North America, Central America, and Europe continue to be the three main regions of origin of tourists to the SICA region, accounting for 79.8% of total tourists, distributed as follows: North America represented 43.1% of tourists in 2019, Central America 23.1%, and Europe 13.6%.



⁵The Dominican Republic is in the Caribbean group, given the geographic region parameter.

● **Graph 6: Tourist arrivals by region of origin**
Thousands of people 2018-2019



In 2019, only tourist arrivals from the Caribbean showed growth over the previous year, with 17%. All other significant regions recorded contractions compared to 2018, the most severe contraction experienced by tourists from Asia with -20%.

Graph 7: Main Markets - SICA Region 2018

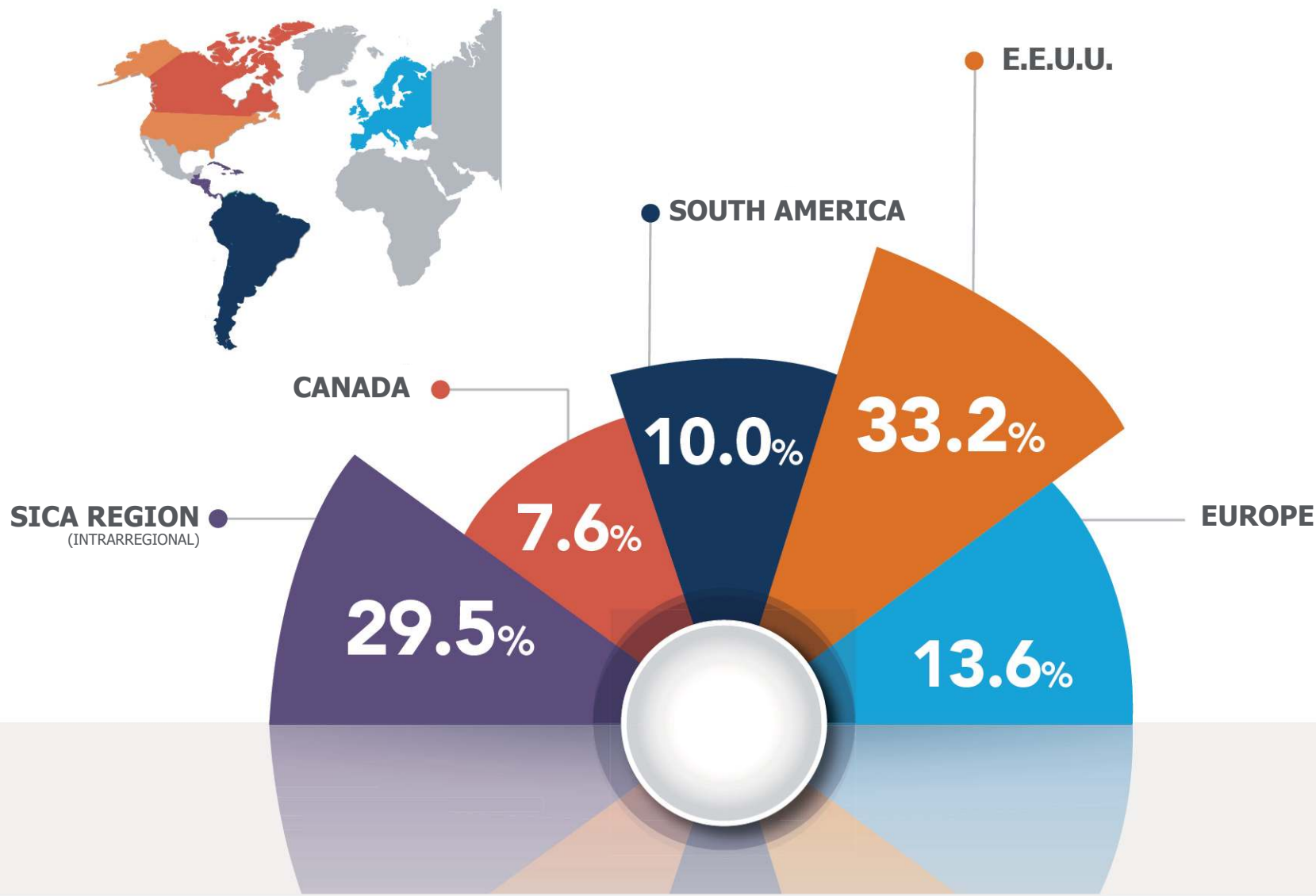


Table 1: Ranking of tourists by country of origin
Percentage of participation of total tourist arrivals

	COUNTRIES AND/OR AREAS	Total	Participation
#01	UNITED STATES OF AMERICA	5,773,615	33.2%
#02	CANADA	1,325,729	7.6%
#03	DOMINICAN REPUBLIC	1,116,433	6.4% <i>Intraregional Market</i>
#04	EL SALVADOR	994,493	5.7% <i>Intraregional Market</i>
#05	GUATEMALA	901,569	5.2% <i>Intraregional Market</i>
#06	HONDURAS	765,726	4.4% <i>Intraregional Market</i>
#07	NICARAGUA	604,887	3.5% <i>Intraregional Market</i>
#08	COSTA RICA	537,148	3.1% <i>Intraregional Market</i>
#09	COLOMBIA	445,060	2.6%
#10	MEXICO	390,762	2.2%
#11	SPAIN	368,932	2.1% <i>Market prioritized by CATA</i>
#12	FRANCE	367,945	2.1% <i>Market prioritized by CATA</i>
#13	GERMANY	344,788	2.0% <i>Market prioritized by CATA</i>
#14	ARGENTINA	299,048	1.7%
#15	UNITED KINGDOM	293,895	1.7% <i>Market prioritized by CATA</i>
#16	VENEZUELA	262,789	1.5%
#17	BRAZIL	237,794	1.4%
#18	RUSSIA	224,906	1.3% <i>Non-traditional emerging markets</i>
#19	PANAMA	179,059	1.0% <i>Intraregional Market</i>
#20	CHILE	172,554	1.0%
#21	ITALY	169,491	1.0% <i>Market prioritized by CATA</i>
#22	CUBA	167,809	1.0%
#23	PERU	131,486	0.8%
#24	PUERTO RICO	115,498	0.7%
#25	NETHERLANDS	115,356	0.7% <i>Market prioritized by CATA</i>
#26	ECUADOR	95,938	0.6%
#27	SWITZERLAND	84,923	0.5% <i>Non-traditional emerging markets</i>
#28	OTHERS - Europe	66,744	0.4%
#29	BELGIUM	58,319	0.3% <i>Non-traditional emerging markets</i>
#30	POLAND	58,128	0.3%
#31	CHINA	57,282	0.3%
#32	PORTUGAL	53,468	0.3%
#33	URUGUAY	46,167	0.3%
#34	ISRAEL	39,786	0.2%
#35	AUSTRALIA	35,832	0.2%
#36	BELIZE	33,171	0.2% <i>Intraregional Market</i>

Historical market shares were maintained in 2019, with the intraregional market being one of the important markets within the regional tourism sector dynamics. In 2019, six of the eight countries in the SICA region were in the top 10, compared to seven countries the previous year. Together, the eight SICA countries contributed 5.13 million tourists, representing 29.5% of the total.

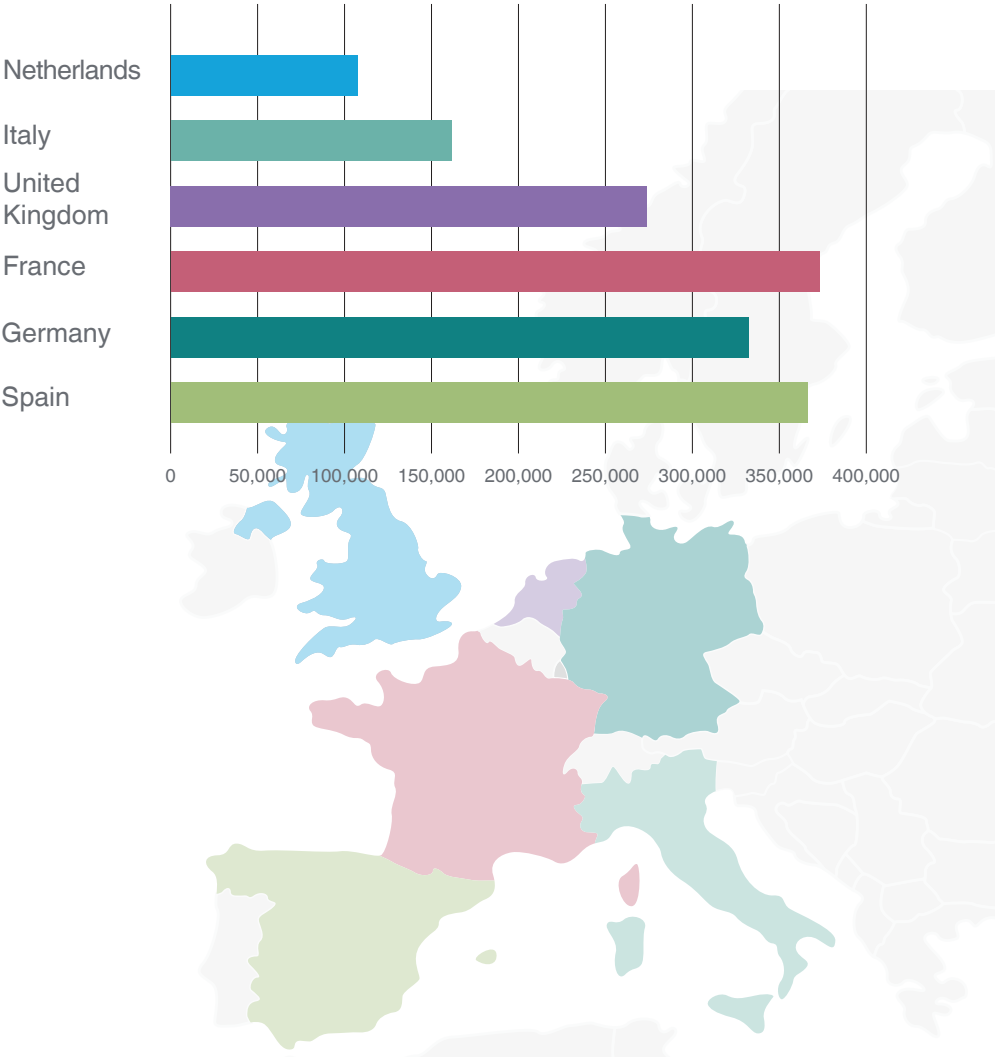
Of the six countries prioritized by CATA, Spain is in the 11th position of tourists' countries, while France and Germany are in the 12th and 13th positions respectively. Finally, Italy and the Netherlands are in positions 21 and 25. The called non-traditional emerging markets, Russia, Switzerland, and Belgium, were in the lead with 224,906; 84,923, and 58,319 tourists respectively in 2019.

The six countries prioritized within the European market by the Central American Tourism Council (CCT) are Germany, Spain, France, Holland, Italy, and the United Kingdom. In 2019, tourists coming from the prioritized countries were 1,660,406.00, which is equivalent to 9.6% of the total received in the region. In 2019, tourists from this segment continued to head to the most outstanding beach tourism destinations such as the Dominican Republic, Costa Rica, and Panama.

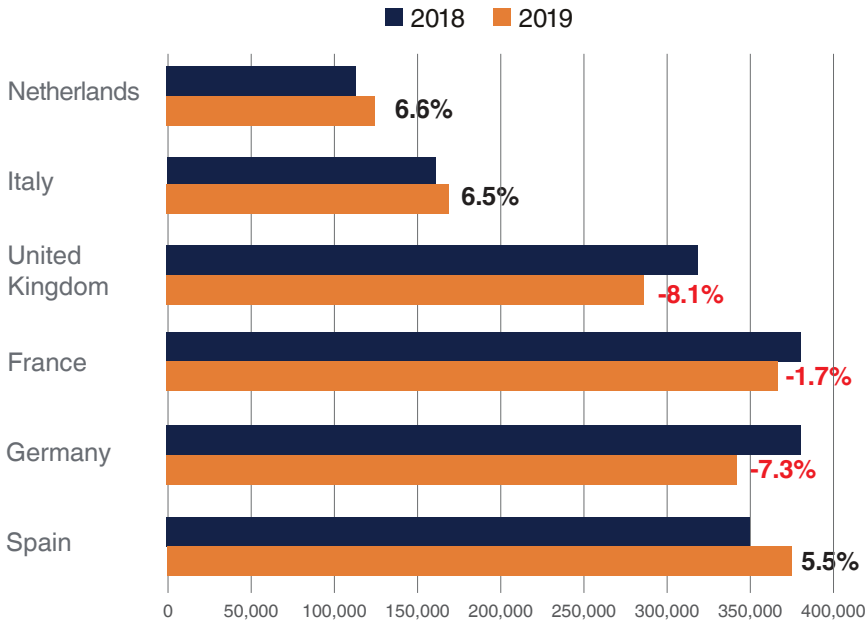
Table 2: Ranking of tourists received

Priority countries in the European market 2019	Rank	Country	Total
	#01	Spain	368,932
	#02	Germany	344,788
	#03	France	367,945
	#04	United Kingdom	293,895
	#05	Italy	169,491
	#06	Netherlands	115,356
1,660,407			

Graph 8: Tourist arrivals
Priority countries in the European market 2019



Graph 9: Tourist arrival of the prioritized countries within the European market
Variation 2018 - 2019



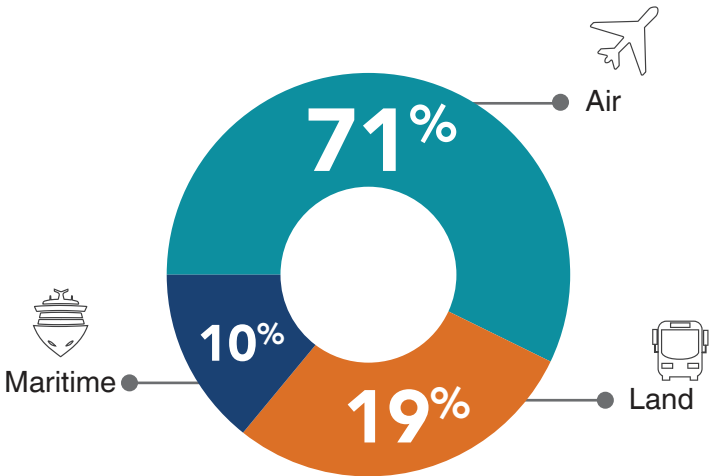
In 2019, tourist arrivals from the United Kingdom, France, and Germany fell compared to 2018. The drop in tourist arrivals from these three countries could not be compensated by the growth presented by Spain, Italy, and the Netherlands, causing net arrivals from the European markets prioritized by CATA to fall by -1.4%.

4.1.4. Tourist arrivals by route of entry

In 2019, the main access route used by tourists visiting the region continued to be the area. This route received 71% of tourist arrivals. Same that was maintained concerning the previous year.

In the second place, and with 19%, land arrivals are typical of intraregional tourists. This route registered a contraction of 2% compared to the previous year when it represented 21%.

Finally, the maritime route continues to be the least important; however, in 2019, its importance was slightly higher than in the previous year. In 2019 the seaway represented 10% of tourist arrivals, while in 2018, it represented 7%.



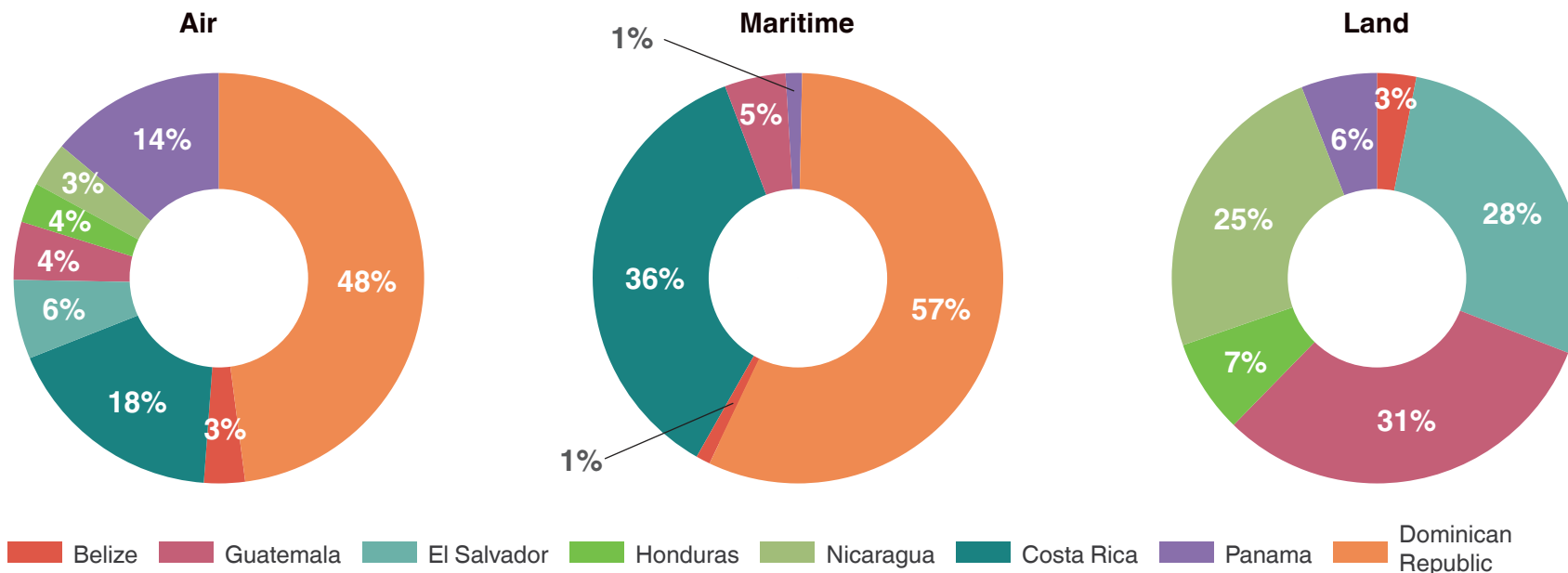
Graph 10. Country participation in tourist arrivals by entry route

In 2019, the Dominican Republic continued to position itself as the country in the region with the highest participation in tourists' arrival by air with 48%. In second place is Costa Rica with 18% and in third place is Panama with 14%. In macroeconomic terms, these three countries stand out as the most "developed" economies in the region, and in terms of tourism offer, all three have in common a vocation for beach tourism.

In terms of tourist arrivals by land, the country with the highest participation was Guatemala, with 31%, followed in second place by El Salvador with 28%, and Nicaragua in third place with 25%. What these countries have in common is that they are part of the Central American Free Mobility Agreement

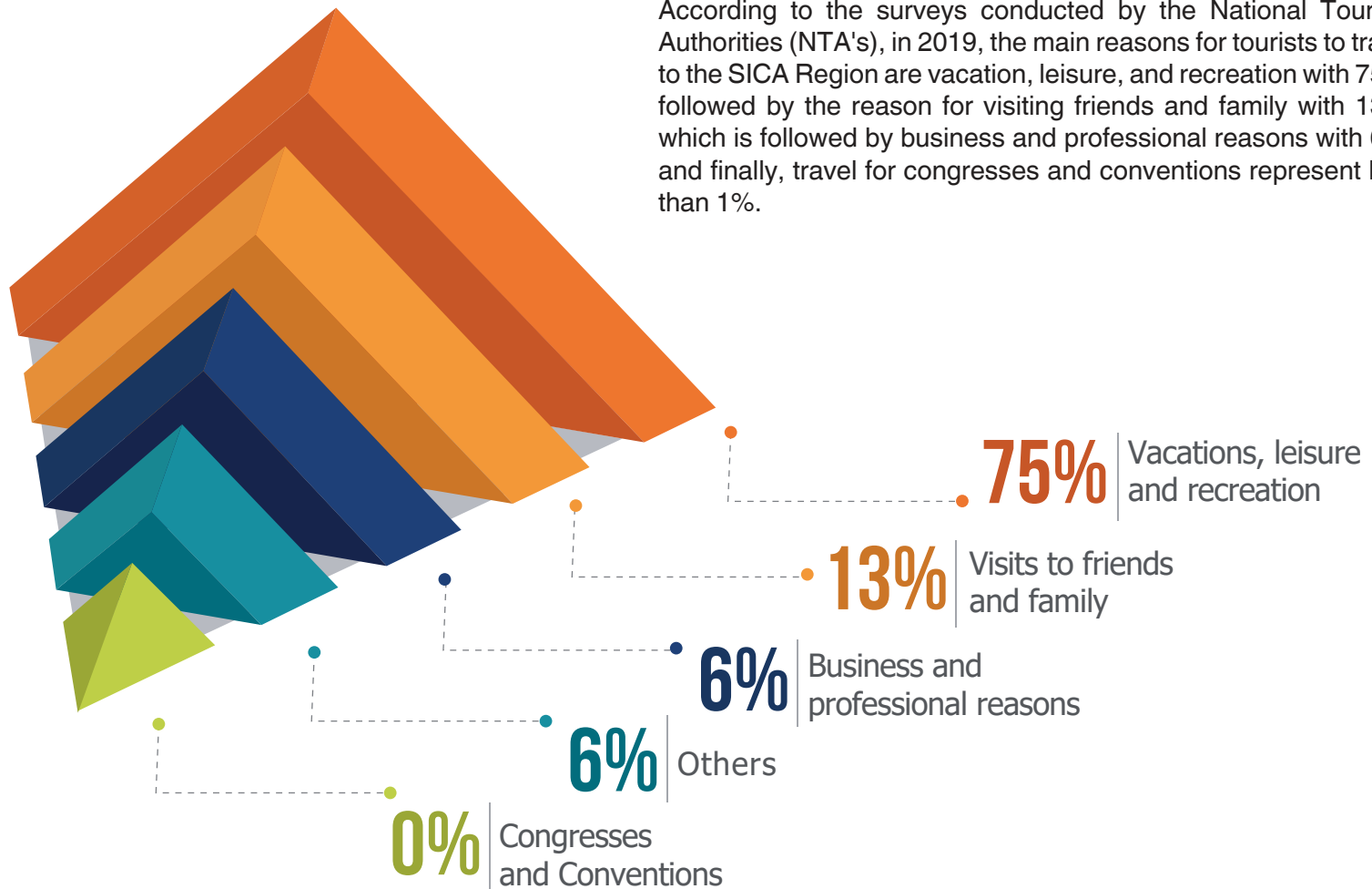
and that the capitals of their countries are on the Pan American highway route, unlike Tegucigalpa, Honduras, which although is part of the (CA-4), is not directly on the Pan American highway.

Finally, in terms of tourist arrivals by sea, the Dominican Republic is once again at the top of the regional ranking, with 57% of the total, which considers the country's island character. In the second position is Costa Rica with 36% of the total, and finally, in the third position would be Guatemala with a distant 5%.



● 4.1.5. Travel Motivation for inbound tourism trips

According to the surveys conducted by the National Tourism Authorities (NTA's), in 2019, the main reasons for tourists to travel to the SICA Region are vacation, leisure, and recreation with 75%, followed by the reason for visiting friends and family with 13%, which is followed by business and professional reasons with 6%, and finally, travel for congresses and conventions represent less than 1%.



Travel Motivation for travel by inbound tourism

Percentage distribution by country 2018 y 2019

Year	Motive	DR	BZ	CR	ES	GU	HO	NI	PA
2018	Congresses and Conventions	0%	0%	1%	2%	2%	0%	1%	6%
	Business and professional reasons	1%	2%	10%	7%	14%	17%	16%	7%
	Vacations, leisure and recreation	92%	96%	74%	40%	53%	42%	38%	70%
	Visits to friends and family	6%	2%	10%	50%	20%	34%	39%	0%
	Others	1%	0%	5%	1%	10%	7%	7%	17%
2019	Congresses and Conventions	0%	0%	1%	1%	1%	0%	n/d	2%
	Business and professional reasons	1%	2%	5%	5%	15%	14%	n/d	5%
	Vacations, leisure and recreation	95%	95%	80%	41%	54%	77%	n/d	71%
	Visits to friends and family	3%	2%	10%	52%	20%	0%	n/d	0%
	Others	1%	1%	5%	1%	11%	9%	n/d	22%
		100%	100%	100%	100%	100%	100%	-	100%

Note: In green the main motive

Source: NTA

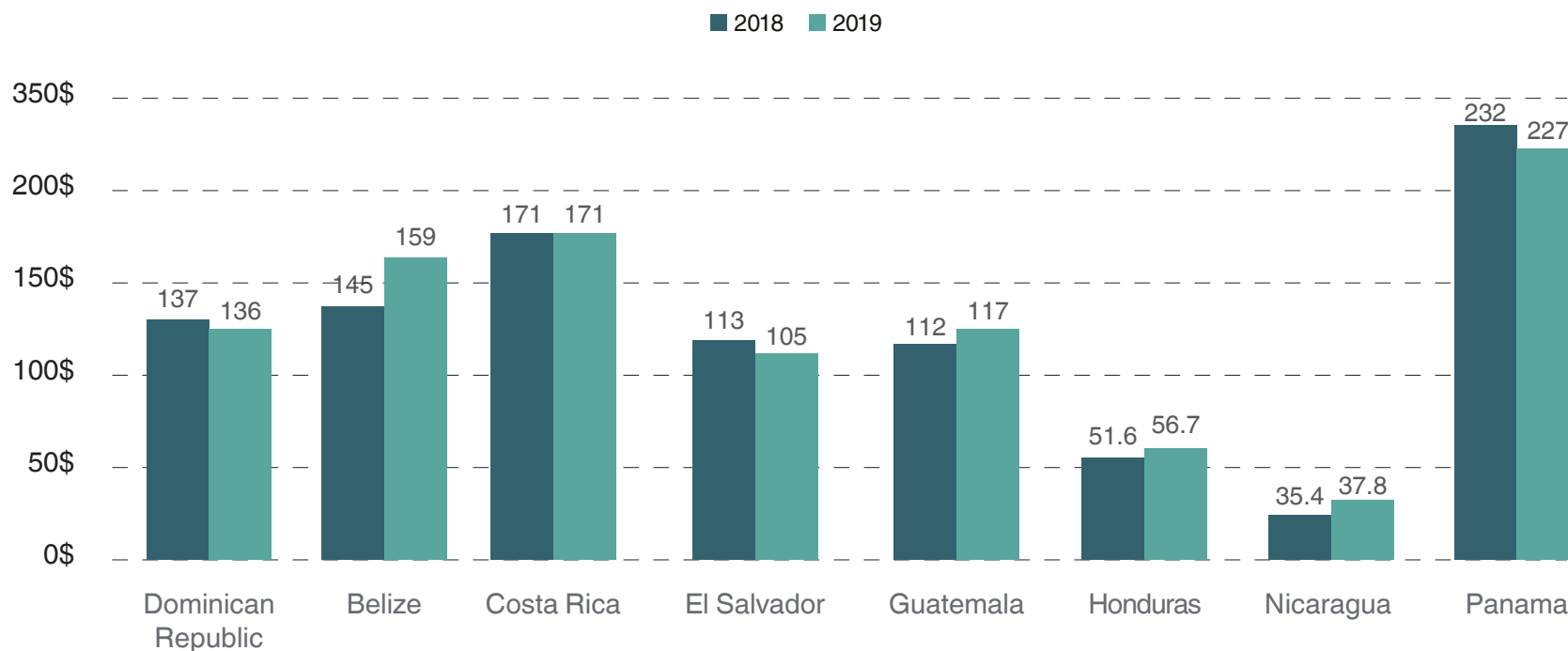
Data based on total visitors

- Although, in regional terms, the main reason for travel is vacation, leisure, and recreation, at the country level, El Salvador and Nicaragua present a different dynamic, in which the main reason for travel is to visit friends and family.
- In the Dominican Republic, Belize, Costa Rica, and Panama, the reasons for travel are highly concentrated in the reason for a vacation, leisure, and recreation; however, in El Salvador, Honduras, and Nicaragua, there is a better distribution of tourists, because the motivations of visiting friends and family and business and professional reasons have greater relative importance concerning the rest of the region.

4.1.6 Average daily expenditure¹⁰

The average daily expenditure in 2019 was US\$ 126, compared to US\$ 125 in 2018. In 2019, only Belize, Guatemala, and Nicaragua registered increases in tourists' average daily expenditure. In the Dominican Republic, El Salvador, and Panama, there was a lower average daily expenditure than the previous year.

**Graph 11: Tourism expenditure
2018 y 2019
Current dollars per day**

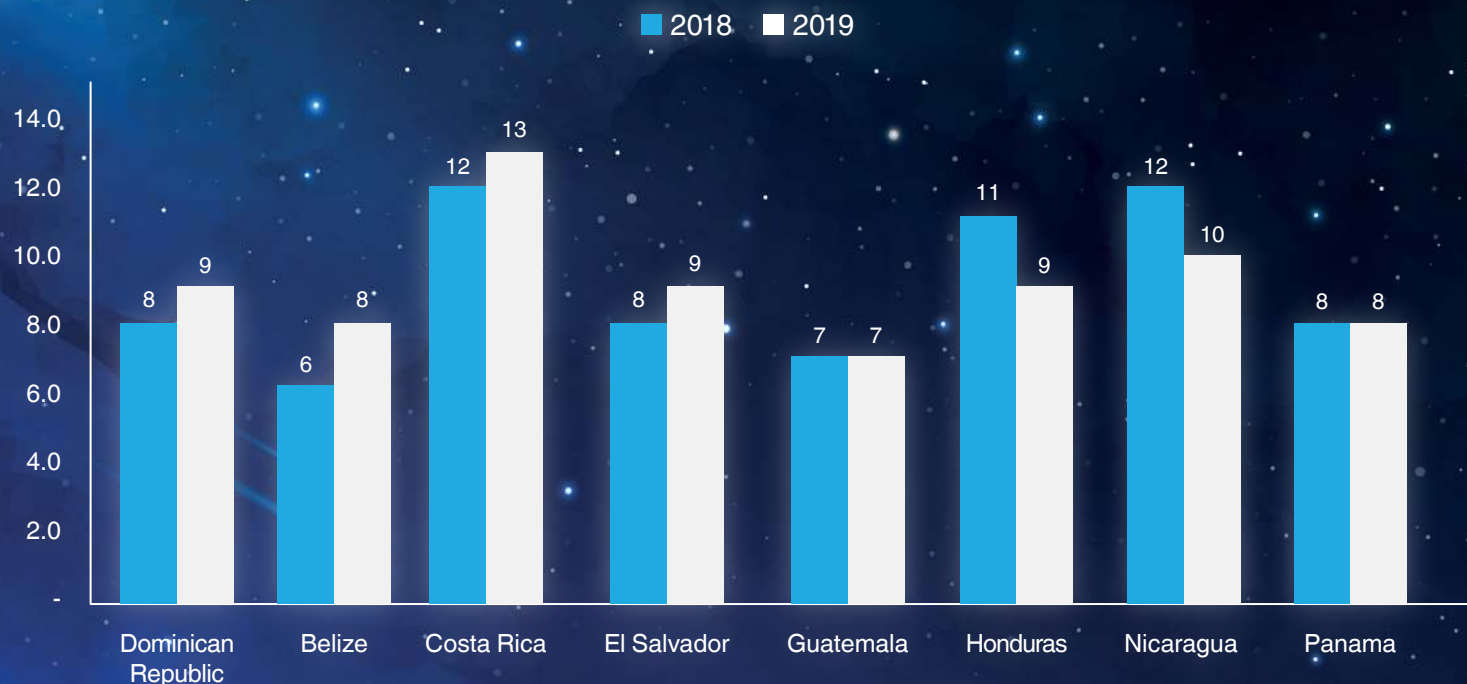


¹⁰ Expense does not include ticket

4.1.7. Average nightly stay

In 2019, the average number of nights of stay was nine, one night more than in 2018. As in 2018, Costa Rica and Nicaragua continue to be the countries where tourists spend the most nights, with 13 and 10 nights respectively. The third positions are the Dominican Republic and El Salvador with nine nights, followed by Panama with eight nights, Guatemala with seven nights, and Belize with six nights. It is important to note that the number of nights depends mainly on each country's offer in terms of product diversification, the establishment of competitive prices, characteristics of their main markets, multilevel organization, promotion, and local dissemination, among others.

Graph 12: Average nightly stay
Number of nights
2019

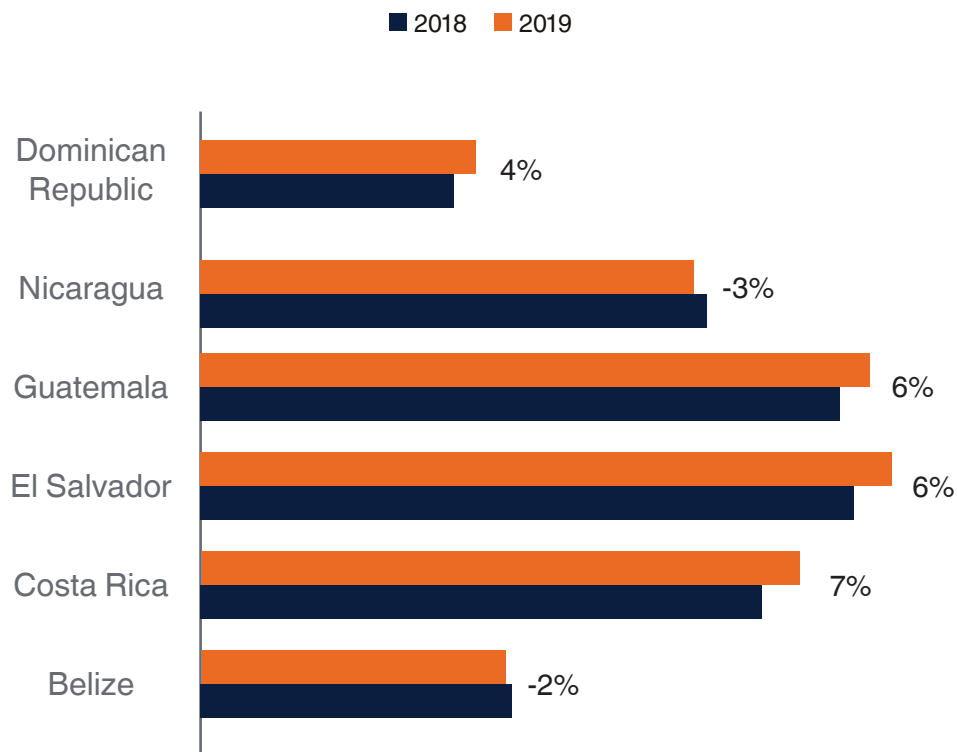


►► 4.2 Outbound tourism

● 4.2.1. Tourist departures

According to official figures, the number of tourists who left the SICA region in 2019 was 5.85^a million, representing an increase of 197.2 thousand tourists compared to the previous year, which is equivalent to a growth of 3%. Of the eight countries in the SICA region, six registered increases, and only Nicaragua and Belize had contractions. In the countries that reported a more significant number of outbound tourists, Costa Rica is the country with the most significant growth, with 7%, followed by Guatemala and El Salvador, both with 6%. In the countries that registered contractions, the most important contraction was Nicaragua, with -3%, mainly explained as a remaining consequence of the events of 2018 that caused a generalized economic contraction in the country.

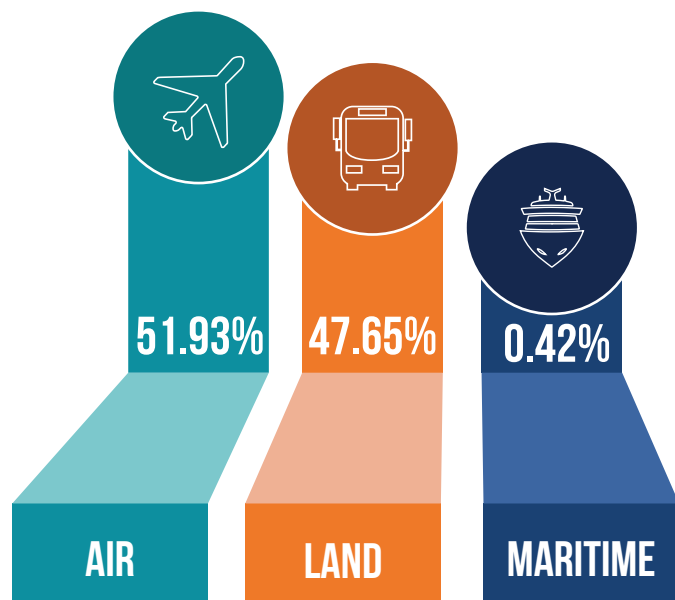
Graph 13: Tourist departures 2019
Thousands of tourists



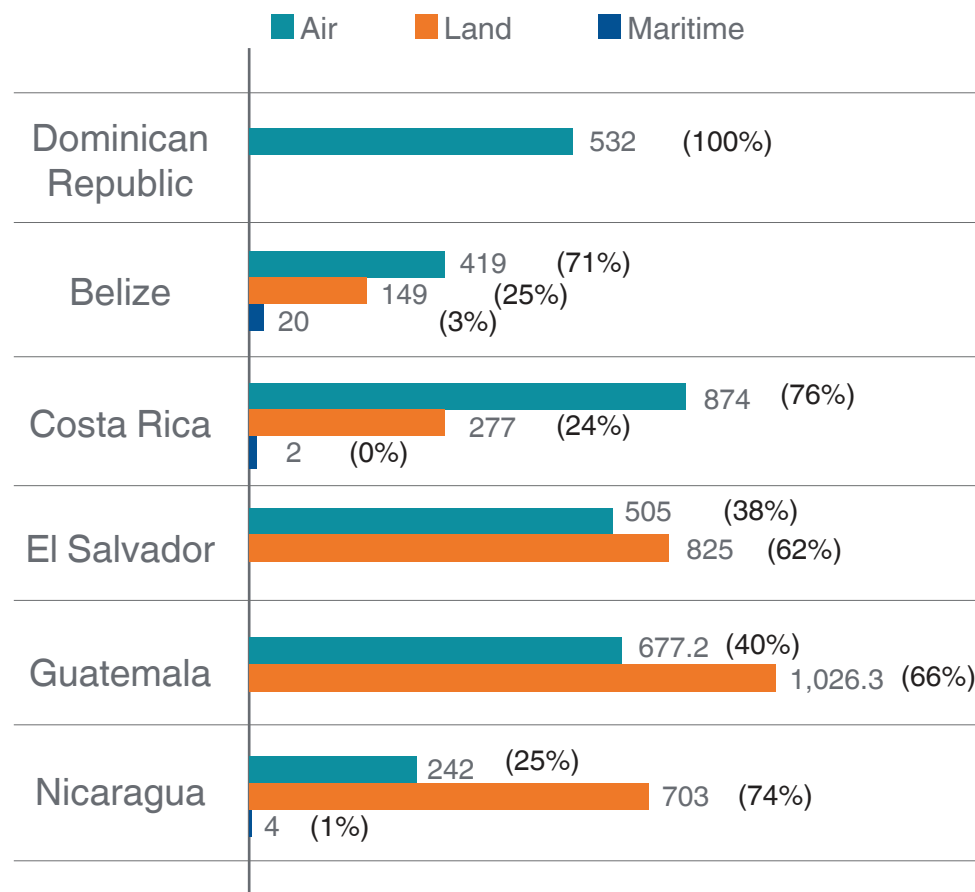
^aDoes not include Panama or Honduras

4.2.2. Departure routes of outbound tourism

The means of transport used by tourists from the SICA region countries during 2019 have a balanced level over time. In 2018, air travel represented 52.4% and land travel 47.2%, while in 2019, air travel represented 51.9% and land travel 47.2%. Although these proportions may vary significantly from one country to another, maritime facilities are not the most important in any SICA country.



Graph 14: Tourist departures by different routes
Thousands of tourists⁷
2019



⁷ Does not include data for Panama

● 4.2.3. Travel Motivations for outbound tourism travel



**Congresses and
conventions**

6%

Others

7%



**Business and
professional motives**

14%



Visiting friends and family

27%



Vacation, leisure and recreation

46%

It is worth mentioning that when writing this report, for the data on the reasons for the travel of outbound tourism, data was only available for three countries: Costa Rica, El Salvador, and Guatemala. In 2019, there were no changes in the motivations of tourists leaving the SICA region. That year, the main reason for outbound tourists to travel was “vacation, leisure, and recreation,” with 46%. In second place is the motive of “visiting friends and family” with 27%, followed in third place by the motive of “business and professional reasons” with 14% and finally “congresses and conventions” with 6%.

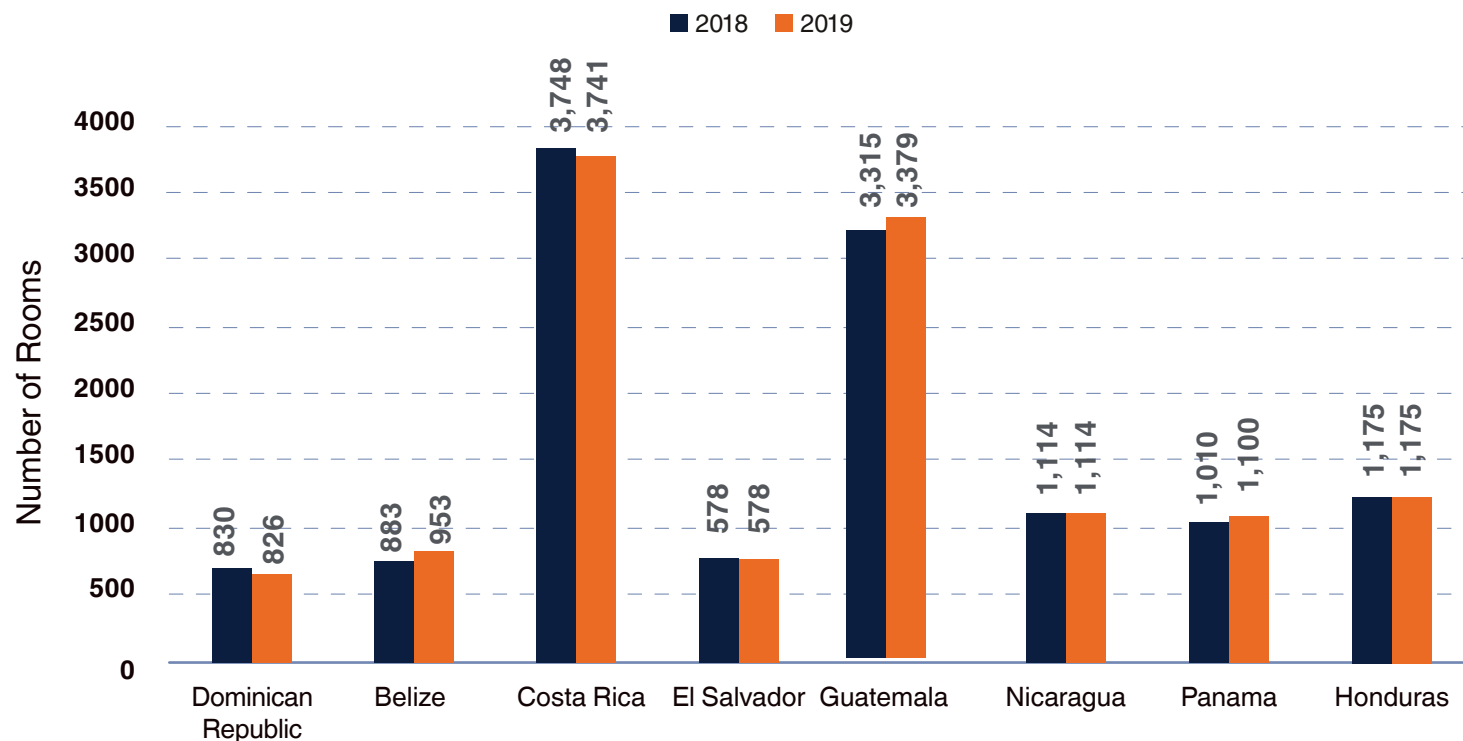
► 4.3 Touristic offer

● 4.3.1. Accommodation

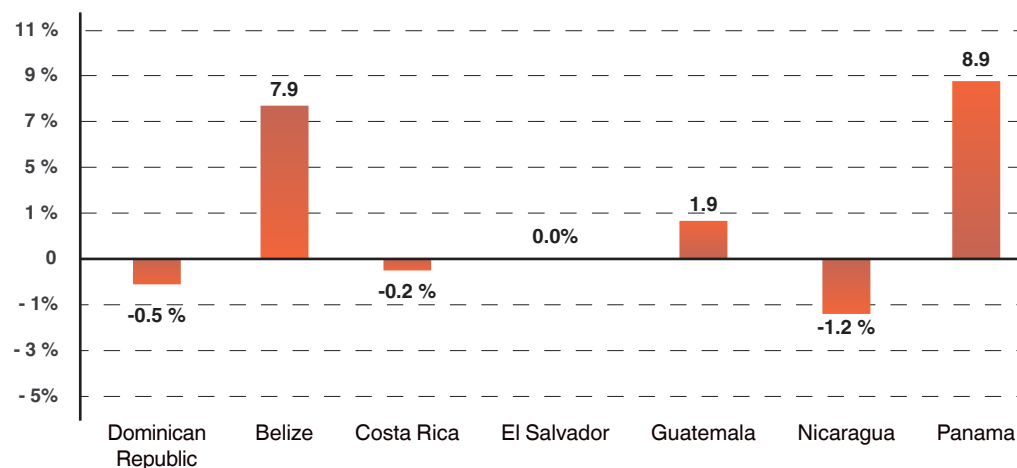
– 4.3.1.1. Number of Establishments

At the end of 2019, the National Tourism Authorities (NTAs) of SICA's member countries reported that a total of 11,678 provided lodging services, which represents a decrease of 975 establishments compared to the previous year, or a contraction of -8%.

**Graph 15: Number of establishments that provide lodging at the regional level
2018 - 2019**



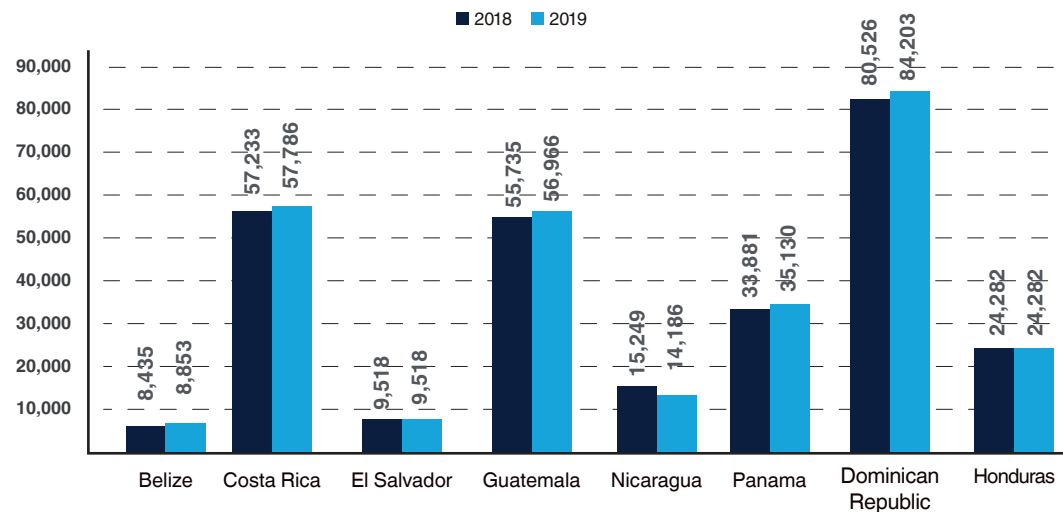
**Graph 16: Establishments that provide lodging
Interannual variation
2018 – 2019**



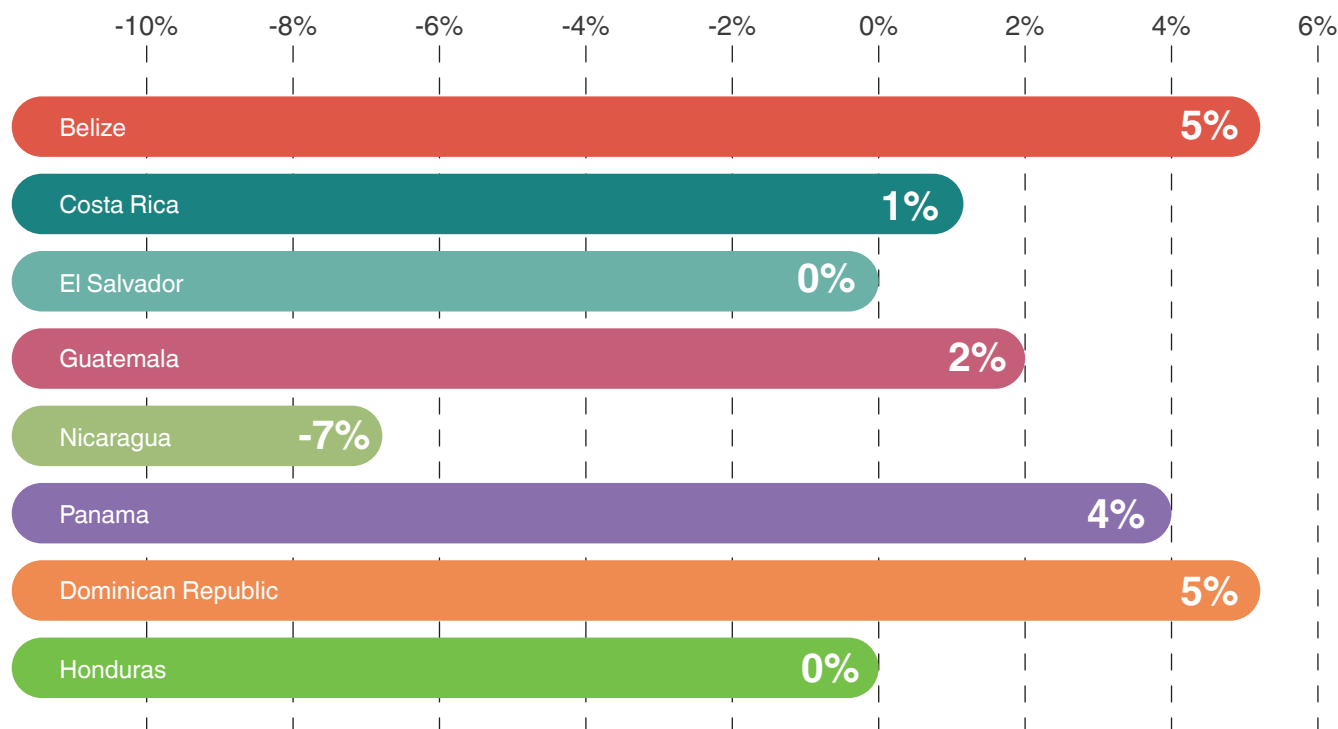
4.3.1.2. Number of Rooms

For the year 2019, the National Tourism Authorities (NTA's) of the SICA member countries reported 290,954 rooms available within the lodging offer. This figure is higher than the previous year by 6,095 rooms, representing a 2% growth over 2018.

**Graph 17: Number of rooms that
provide lodging at regional level
2018 – 2019**



Graph 18: Room Supply
Interannual variation
2018 – 2019

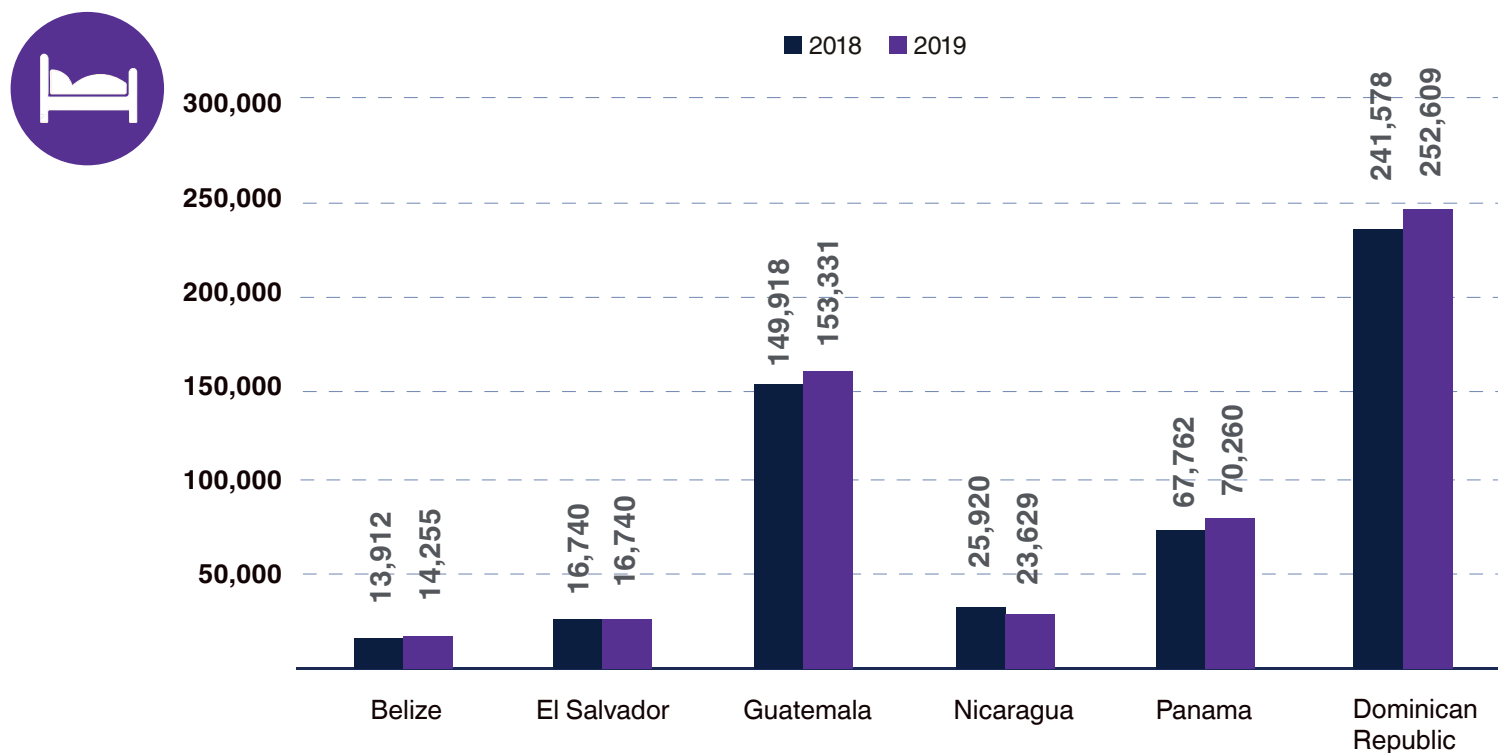


The contraction presented in Nicaragua's case is a consequence of a generalized contraction of the economy in 2018, which significantly affected the supply of housing services in the country. In fact, along the same lines, the number of establishments that provide lodging was 12,853 in 2019, 200 establishments (1.6%) more than in 2018. At the country level, Panama and Belize led the growth of these establishments, with variation rates of 8.9% and 7.9%, respectively. In contrast, Nicaragua, the Dominican Republic, and Costa Rica registered contractions in the number of establishments offering to lodge, with variation rates of -1.2%, -0.5%, and -0.2%, respectively.

4.3.1.3. Number of Beds

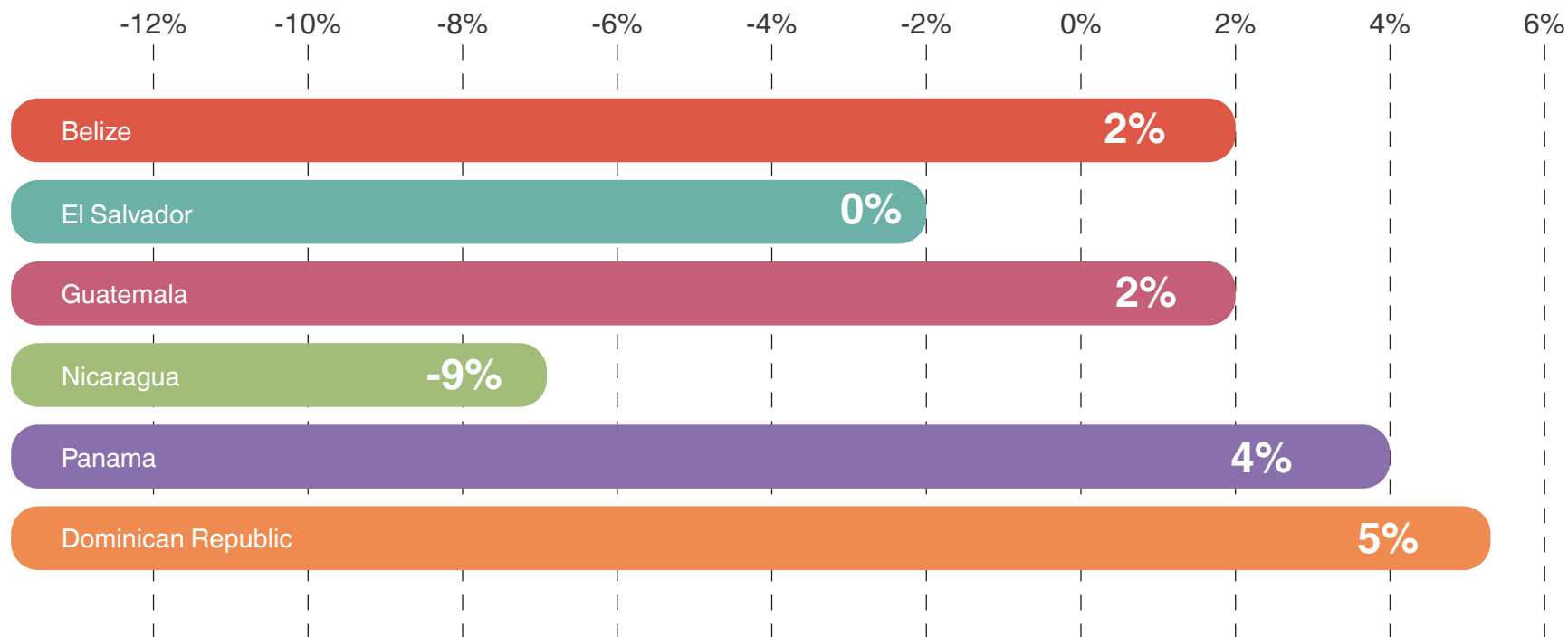
At the end of 2019, the SICA member countries reported 530,824 beds⁸ included in the accommodation offer, with a growth rate of 3%, equivalent to 14,994 new beds. The increase in the number of beds is in line with the highest number of rooms recorded at the regional level, as seen in the previous section.

**Graph 19: Number of beds in the regional accommodation offer
2018 – 2019**



⁸Data does not include Costa Rica and Honduras

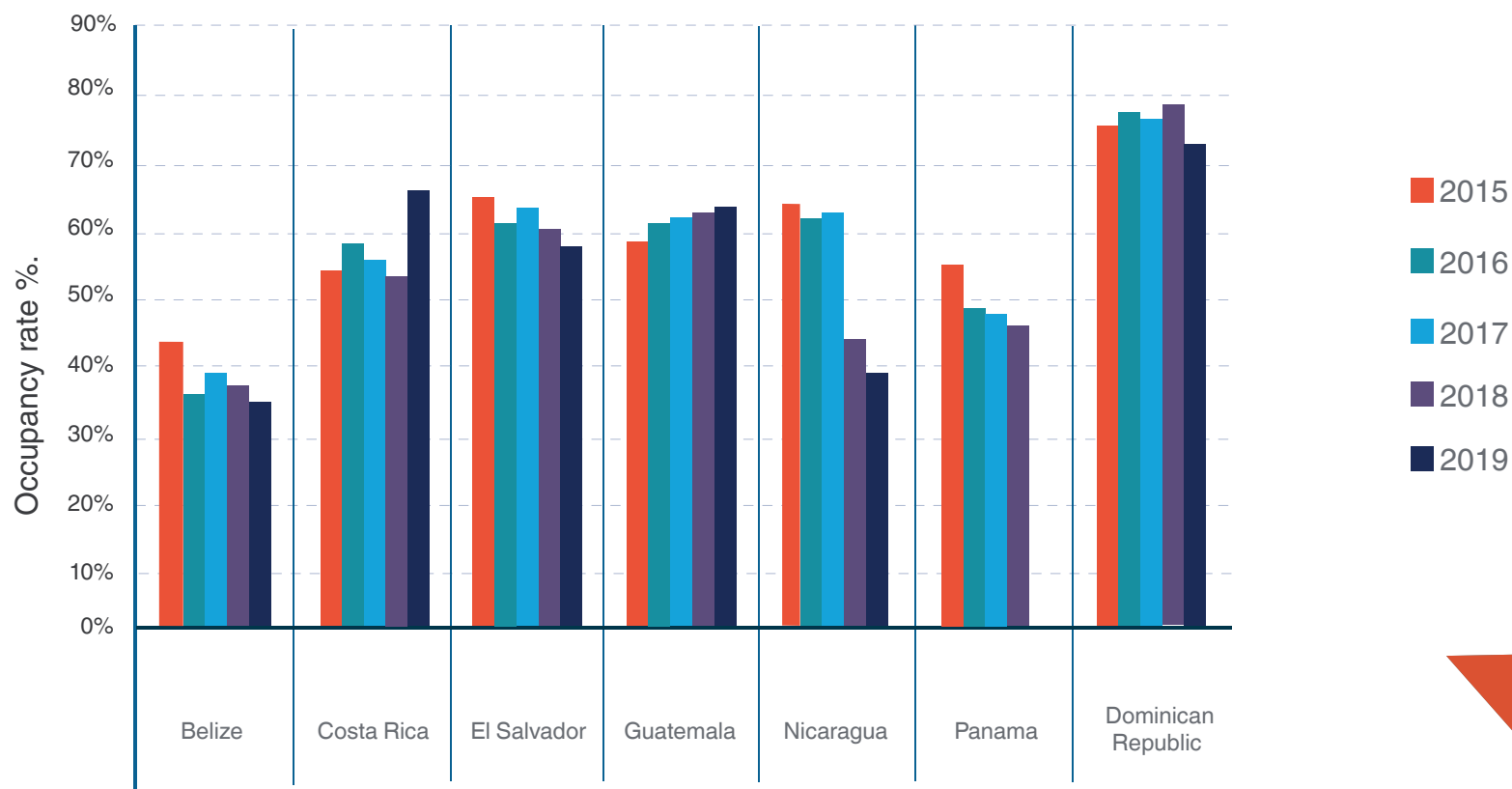
Graph 20: Beds Supply
Interannual variation
2018 – 2019



4.3.1.4. Hotel occupancy

As of this document's preparation, there are no data on hotel occupancy for Honduras or Panama for 2019. Average hotel occupancy for the region was 56% of total capacity, with significant differences at the country level. The country with the highest hotel occupancy level was the Dominican Republic with 72%, while the country with the lowest occupancy was Belize with 37%.

Graph 21: Hotel Occupancy
Rate Percentage (%) of total capacity
Selected period



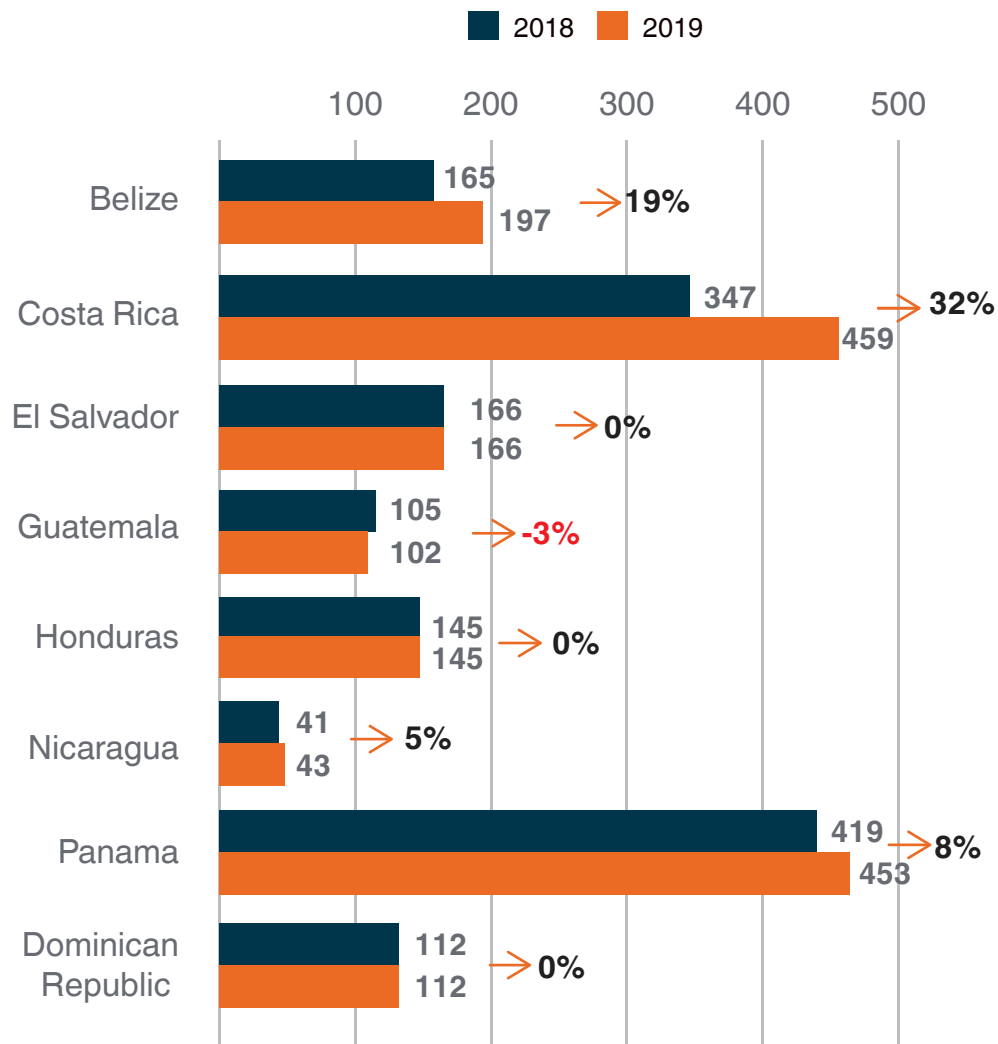
4.3.2. Travel Agencies



In 2019, the SICA region countries registered a total of 2,412 travel agencies, representing a combined growth of 7.9% or 177 new agencies over the previous year. The Dominican Republic continues to dominate this aspect with a total of 847 travel agencies, followed far behind by Costa Rica and Panama with 459 and 453 travel agencies, respectively. Regarding this variable's dynamism, the country where the number of travel agencies grew the most was Costa Rica with 32% growth.

2018	2,235
2019	2,412

**Graph 22: Number of travel agencies
2018 – 2019**





V. COMMERCIAL AND ECONOMIC DATA

► 5.1 Revenues generated from tourism

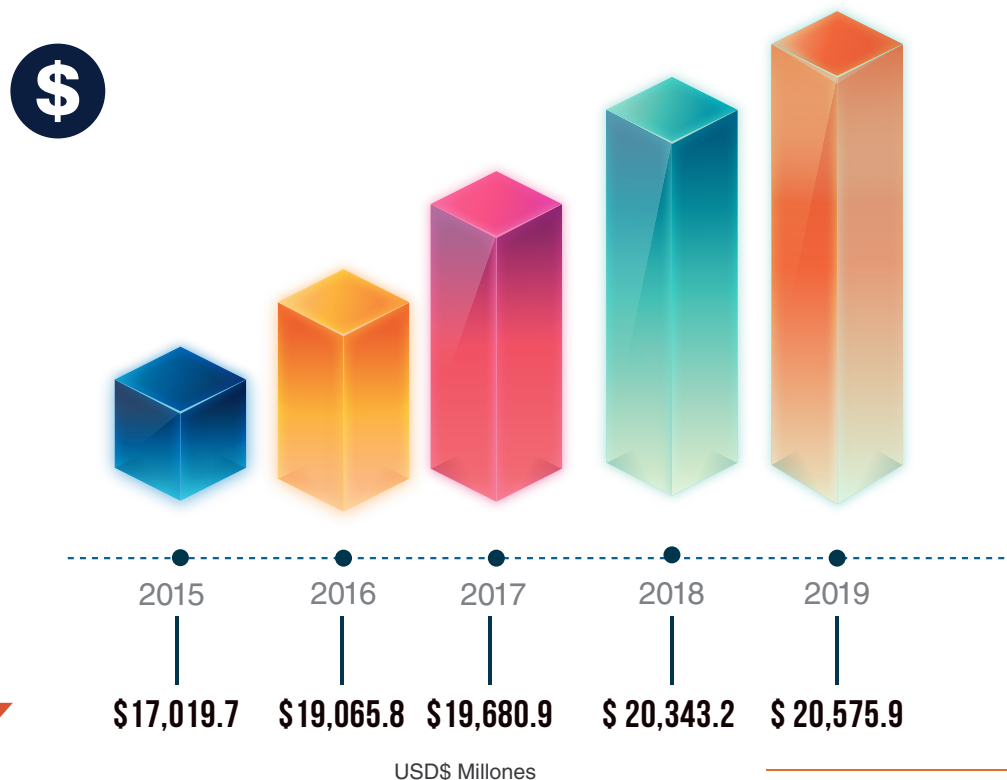
During 2019, the SICA region generated about US\$ 20,575.9 million in tourism, which represents a growth of 1.1% or US\$ 232.7 million over the previous year. Concerning the composition of tourism income, it is worth mentioning that there are profound differences between the countries due to their local markets and each country's price levels.

At the country level, the distribution of regional income from tourism is given as follows: The Dominican Republic, Panama, and Costa Rica concentrate 78% of tourism income, with 36%, 22%, and 19%, respectively. The remaining five countries account for only 22% of regional income. The distribution of that 22% is as follows: El Salvador (9%); Guatemala (6%); Honduras (3%); Belize (3%) and Nicaragua (3%).

In terms of dynamism, the country that registered the most remarkable growth in tourism income in 2019 was El Salvador, whose tourism income went from US\$ 1,532.6 million in 2018 to US\$ 1,761.2 million, which represents an increase of 14.9%. Belize follows, whose income went

from US\$ 504.1 million in 2018 to US\$ 536.1 million in 2019, which means a growth of 6.3%. In contrast, the country that registered the most severe contraction was Nicaragua. In Nicaragua, the events of 2018 continued to manifest themselves for the second consecutive year, reporting in 2019 revenues of US\$ 515.4 million, -5.3% less than the previous year.

Graph 23: Revenues generated from tourism
SICA Region
2015 – 2019
US\$ Millions



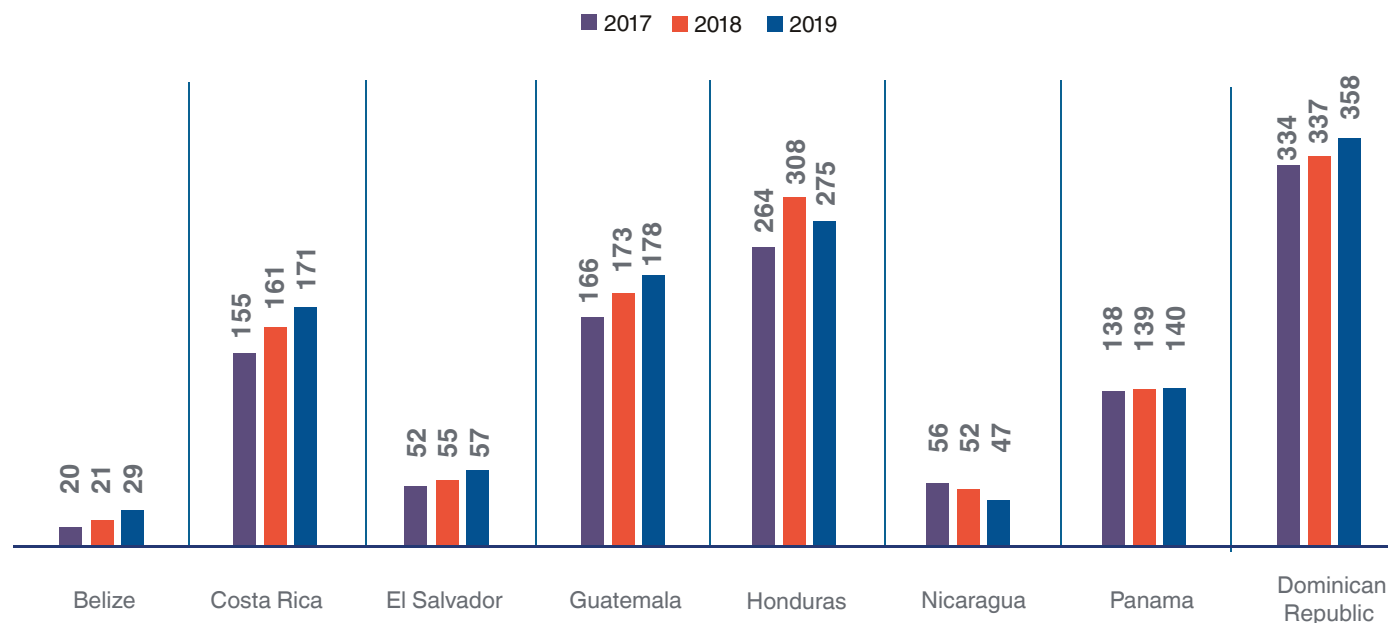
► 5.2 Direct and indirect jobs generated from tourism

In 2019, the tourism sector generated 1.255 million formal jobs, a modest increase of only 9.1 thousand jobs over the previous year.

At the country level, employment generation in the tourism sector was heterogeneous, as described below:

Belize is the country where employment in the sector grew the most, with a growth of 38.1%, followed by the Dominican Republic and Costa Rica, with increases of 6.2% and 6.1%, respectively. In contrast, Honduras and Nicaragua recorded lower employment levels in 2019 than in 2018, with contractions of -10.7% and -9.2%, respectively.

Graph 24: Distribution of formal jobs in the tourism sector
SICA Region
Thousands of people
2017 – 2019



CLOSING COMMENTS

The tourism sector's performance in the SICA region during 2019 consolidated some trends seen in previous years, which have little to do with the tourism offer of the countries in the region and more related to the extra-regional market. The number of total visitors showed a downward trend since 2016, which was consolidated in 2019, and will become more pronounced in 2020. And in the same line, the income derived from tourist activities also presented a decreasing growth since 2016, until contracting with no historical present because of the Covid-19 in 2020.

Without a doubt, "The Great Enclosure" as the International Monetary Fund (IMF) calls the situation during and after the so-called preventive quarantines, declared by countries around the world to deal with the CoVid-19 epidemic, will have a lasting effect on the local economies of the SICA Region, with diverse consequences at the sectoral level. In the tourism sector, the first thing that can be expected is a gradual and progressive recovery of local tourism, to later experience a slow recovery of intraregional visitors and long-distance markets (extra-regional). The main reasons for the slow recovery of international arrivals in a post-2020 context is that despite the free resumption of air travel, the Covid-19 paralyzed and in many cases redirected various investments in the SICA countries towards other markets and sectors, based on containment priorities and policies focused on health and pandemic mitigation, leaving tourism in a second political order of generalized importance. On the other hand, the quarantine extensions in European markets and, along the same lines, the high unemployment situations in the main extra-regional markets of origin of visitors such as the United States, suggest a lower number of visitors coming from those markets soon.

In this sense, an unfavorable performance in the tourism sector has the potential to slow down other areas of the local economies, mainly through a lower inflow of foreign currencies, mostly US dollars, and through a

greater precariousness of labor conditions within the tourism sector itself, manifested through a higher level of informality in the sector.

To face the new decade that begins in 2021 and to reverse the economic damage caused by the Covid-19, the SICA region's countries acquired new and significant public debt levels throughout 2020, placing fiscal policy as the main instrument to face the crisis. Still, it is important to remember that it is not the only one. Although the arrival of this new debt makes an already weakened fiscal situation more complex, the SICA region countries have understood in a timely manner the need to chart courses of action that will allow for the gradual reactivation of tourism. It will not be possible to correct the new and high levels of informality in the sector in the short run. Still, it is possible to boost the sector through strategies to promote local tourism as the last quarter of 2020 approaches, ensuring a modest but healthy dynamism in local industries. In the medium term, the sector's recovery in a more general sense will be linked to the recovery of the U.S. and European economies, and a gradual normalization of capital flows to the region's countries.

In sum, although the regional tourism activity received a hard blow in 2020, the countries' strategies, in synergy with the collective efforts from the different scenarios of the Central American Integration System, will allow an unquestionable recovery of the sector in the first half of the new decade. The current situation, although difficult, will be overcome with the combination of the appropriate elements of political will, economic resources, social resilience, innovation and business creativity, and international cooperation.



GLOSSARY

NTA's – National Tourism Authorities

CATA – Central America Tourism Agency

CCT – Central American Tourism Council (acronym for its Spanish equivalent)

SICA – Central American Integration System (acronym for its Spanish equivalent)

SITCA – Secretariat for Central American Tourism Integration (acronym for its Spanish equivalent)

UNWTO – United Nations World Tourism Organization

CONTACTS

Country	Entity	Contact
Belize	Belize Tourism Board (BTB)	www.travelbelize.org datarequests@belizetourismboard.org (501) 227-2420
Costa Rica	Costa Rican Tourism Institute (ICT)	www.visitcostarica.com info@visitcostarica.com (506) 2299-5800
El Salvador	Tourism of El Salvador (MITUR)	www.mitur.gb.sv (503) 2243-7835
Guatemala	Guatemalan Tourism Institute (INGUAT)	www.visitguatemala.com info@inguat.gob.gt (502) 2421 - 2800
Honduras	Ministry of Tourism of Honduras (IHT)	www.letsghonduras.com estadistica@iht.hn (504) 2222-2124
Nicaragua	Nicaraguan Tourism Institute (INTUR)	www.intur.gob.ni estadisticasit@intur.gob.ni (505) 2254-5191
Panama	Tourism Authority of Panama (ATP)	www.atp.gob.pa mercadeo@atp.gob.pa (507) 526-7000
Dominican Republic	Tourism of the Dominican Republic (MITUR)	http://mitur.gob.do/ sectur@sectur.gob.do (809) 221-4660

Eight countries *A single Region*





SICA
Sistema de la Integración
Centroamericana

From the north corner of channel 2, 2c up
House # 1004. Bolonia. Managua Nicaragua.
Tel .:(505) 2268 3849
Contact: sitcatourism@gmail.com

   sitca_turismo