



# Compendium of Tourism Statistics 2020

SICA Region

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by the Secretariat for Central American Tourism  
Integration (SITCA)

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**SICA**  
Sistema de la Integración  
Centroamericana

# Compendium of Tourism Statistics for SICA Member Countries SICA 2020

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

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# **I. INTRODUCTION**

# SITCA

SECRETARÍA DE INTEGRACIÓN  
TURÍSTICA CENTROAMERICANA



**Ilka Aguilar Valle**  
SITCA Executive Secretary

Through the Secretariat for Central American Tourism Integration (SITCA), the Central American Tourism Council (CCT), recognizes the tourism sector as an enhancer of local economies, an element of cohesion among multiple regional value chains and a platform for economic growth and improvement of living conditions for citizens of countries in the SICA region. Regional and global tourism activities are facing unprecedented challenges as a result of the new normality the Covid-19 pandemic has imposed on countries. Consequently, the regional tourism sector requires, today more than ever, close, timely, and effective follow-up to ensure favorable results, preserve employment, and contribute to the overall economic recovery of Central America and the Dominican Republic.

The Compendium of Tourism Statistics 2020 is a synthesis of the situation regarding tourism. It was made possible thanks to the contributions of the National Tourism Authorities (NTAs) of Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama, and the Dominican Republic. This document systematizes statistics from a regional perspective to provide the reader with a consolidated vision of the tourism sector, offering inputs to support the design, planning, and execution of actions that foster innovation, promotion, growth, and modernization of sustainable tourism models at both national and regional levels.

The Secretariat for Central American Tourism Integration (SITCA) hereby makes available to the public this graphic, informative and analytical tool on various data and indicators regarding the tourism sector that guides the behavior of the tourism industry at regional level.



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





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

Both SITCA and the CCT were officially created through Resolution VI of the First Extraordinary Conference of Ministers of Foreign Affairs of Central America, held in San Salvador, El Salvador, from 29 March to 2 April 1965. Subsequently, during the XLI Ordinary Meeting, held on 27 June 2013, the heads of state and government of the SICA countries agreed that SITCA's headquarters would be reinstalled in Nicaragua starting in the second semester of 2013.

## ► Background

The "Agreement for the Unification of the Central American Standards Project for the Promotion of Tourism" was constituted at an informal meeting of the Ministers of Foreign Affairs of Central America, in February 1965. Here the first foundations were laid for the Secretariat for Central American Tourism Integration as an official regional tourism organization whose purpose would be to promote the development of tourism in the region, with broad powers to manage the support of governments, banking and financial entities for the purpose of attaining said objective. The Agreement sets forth SITCA's purposes, functions, assets and general provisions.

That same year, during the First Extraordinary Conference of Ministers of Foreign Affairs of Central America, held in San Salvador from 29 March to 02 April, Resolution VI established

that the Central American Tourism Council (CCT) would have a permanent office and be titled Secretariat for Central American Tourism Integration (SITCA). Likewise, it would have its permanent headquarters in Managua, Nicaragua.

After 26 years in Nicaragua, SITCA moved its headquarters to the building of the General Secretariat of the Central American Integration System (SG-SICA) in San Salvador, El Salvador, where it served as the SICA General Secretariat's Directorate of Tourism (DITUR/SG-SICA) and as Technical Secretariat of the CCT (ST-CCT) until 2013. In 2013-2014, it was reinstalled at its original headquarters in 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 in Spanish) 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. It was agreed it would be governed by regulations to be formulated by the CCT.

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

### CCT Objectives

- To facilitate and stimulate the development of tourism throughout the Central American region.
- 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, at both national and regional levels and ensure that efforts concerning the development of tourism in Central America are effectively carried out.



## **III: WORLD TOURISM**

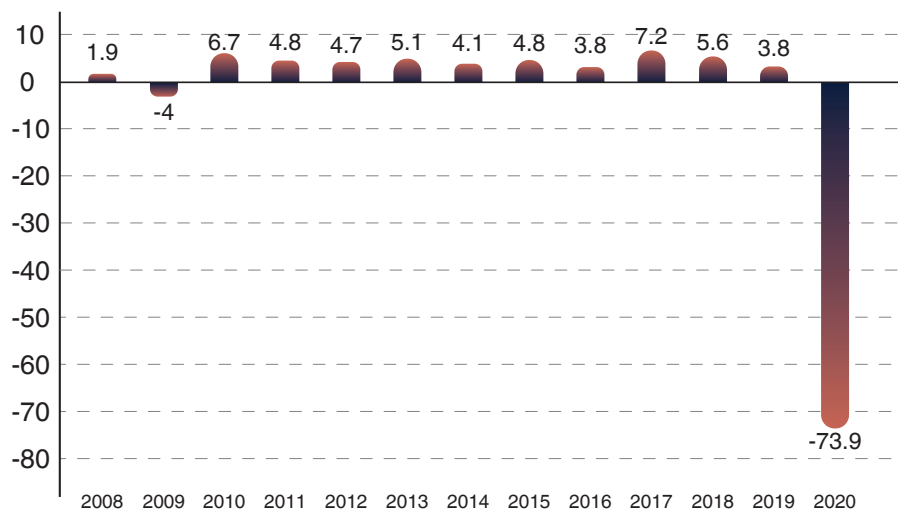
## ► Section 3.1. Tourist arrivals in the world<sup>1</sup>

According to the World Tourism Organization (2021), in 2020, tourism suffered its biggest crisis ever, following the unprecedented health emergency stemming from the Covid-19 pandemic. International tourist arrivals fell by 73.9% in 2020 compared to 2019, due to widespread travel restrictions and a massive slump in demand for tourism services.

The stunning drop in tourist travel in 2020 represents 1 billion fewer international arrivals than the year before, 2019 and the numbers are those for international tourist arrivals 30 years ago. Before the Covid-19 pandemic, the most severe drop in international tourist arrivals had been recorded in 2009, with a drop of 4% in the context of a global slowdown caused by the international financial crisis of the time.

### 2020: The deepest tourism crisis

**Graph 3.1: International tourist arrivals worldwide**  
Growth rate (%)



Source: World Tourism Barometer – January 2021

The collapse in international arrivals in 2020 represents an estimated loss of US\$1.3 trillion in total export earnings, which is more than 11 times greater than the losses recorded in 2009. This drop translates into a worldwide economic loss of US\$ 2 trillion in the tourism sector's contribution to global Gross Domestic Product (GDP), or more than 2% of the world's GDP.

In terms of employment, the crisis caused by Covid-19 has put at risk or eliminated between 100 and 120 million direct jobs globally, most of which are in micro, small and medium-sized enterprises with high participation of women and young people.

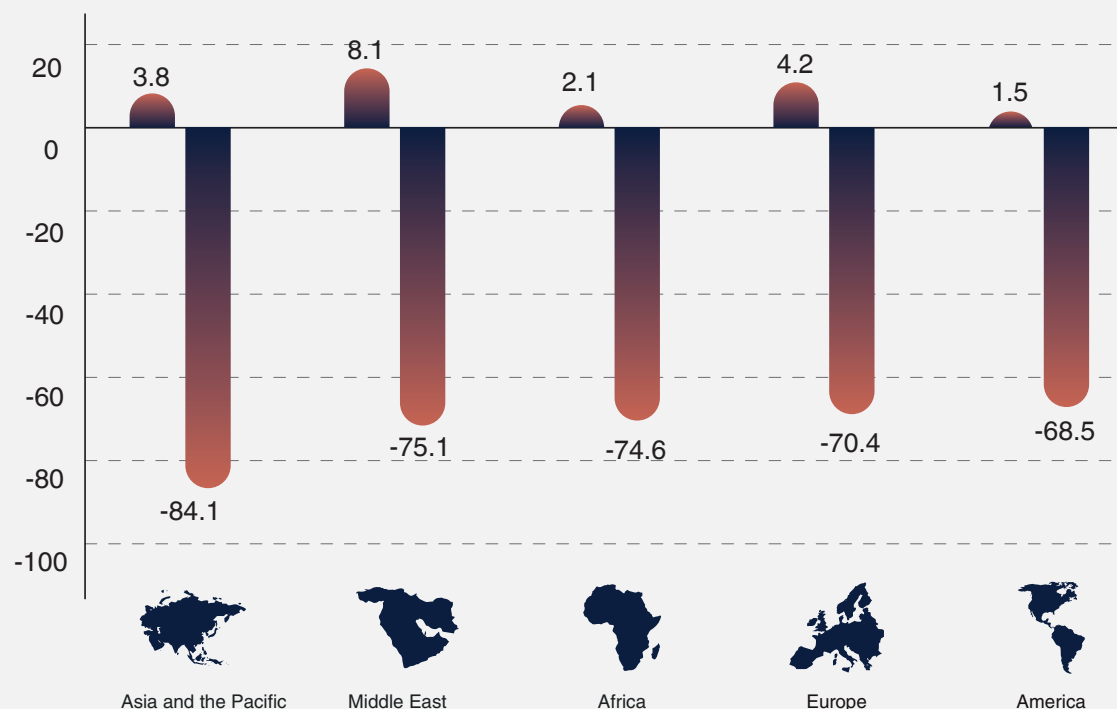
Despite the foregoing, the World Tourism Organization (2021) also mentions that although demand for international tourism fell precipitously, worldwide domestic tourism showed improvements in the second half of 2020. In some large markets such as China, domestic air travel returned to pre-Covid levels during the second half of 2020.

<sup>1</sup>Billions = Thousands of millions

## ► Section 3.2. Tourist arrivals per region

In regional terms, the year-by-year variation of international tourist arrivals in 2020 saw the following behavior: In the Asia-Pacific region, which was the first region to feel the impact of Covid-19, arrivals contracted by 84.1%; in the Middle East, 75.1%; in Africa, 74.6%; in Europe, 70.4%; and finally, in the Americas, 68.5%.

**Graph 3.2: International tourist arrivals by region**  
Growth Rate (%)



Fuente: World Tourism Barometer – January 2021

At the sub-region level, according to data from the World Tourism Organization (2021), there was no sub-region in the world in 2020 that did not record a contraction in tourist arrivals. At 88.1% northeast Asia recorded the most severe contraction. In Europe, the most significant contraction was recorded by the northern Europe subregion, at 75.3%. In the Americas, the sub-region with the most considerable contraction in tourist arrivals was Central America, with 74.3%. And finally, in Africa, the North African subregion had the sharpest drop in tourist arrivals, with 78.3%.

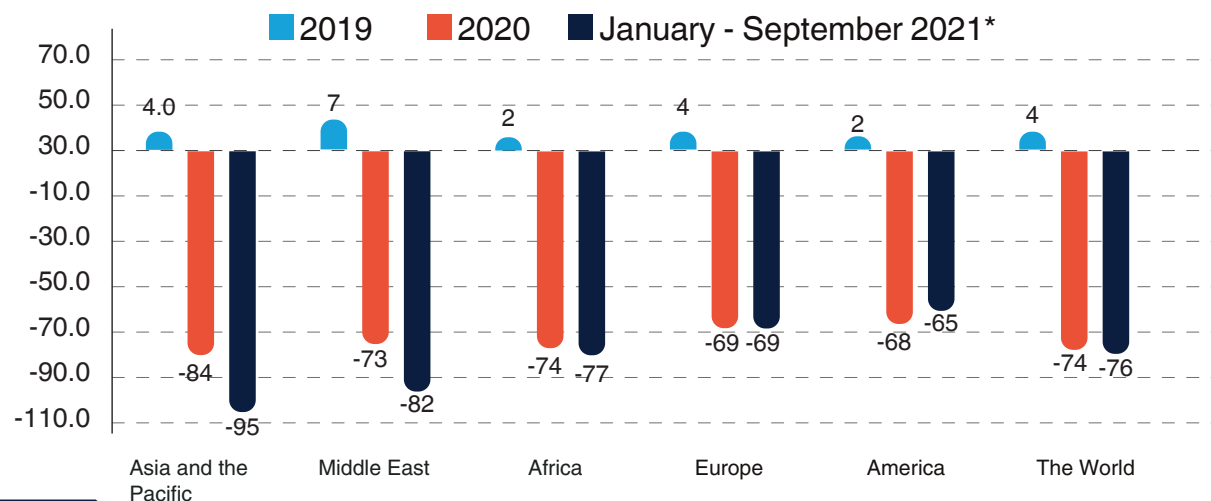
### ► Section 3.3. Prospects for 2022

In the Compendium of Tourism Statistics of the countries in the SICA region, published in January 2021 by the Secretariat for Central American Tourism Integration (SITCA), it was already foreseen that the performance of the tourism sector during the year 2021 would continue to be highly influenced by the effects of the Covid-19 pandemic, and by the actions taken by the countries to combat it. For the year 2021, the main determinants of tourism activity at global level were:

1. Travel restrictions, including costs associated with Covid-19 confirmation tests, provisions for total or partial closures of some regions, and specific provisions stipulated by the airlines, among others.
2. Progress made in vaccination campaigns in each country.
3. The presence or absence of quarantines, as well as their severity.
4. Unemployment.
5. The presence or absence of programs (public or private) to support MSMEs, mainly in the tourism sector.
6. Domestic tourism demand.

Finally, regarding tourist arrivals during the year 2021, according to data from the United Nations World Tourism Organization (UNWTO), a comparison of cumulative results for January - July 2021 with the pre-crisis value of 2019, shows the result described in Graph 3.3.

**Graph 3.3: International Tourist Arrivals by Region Growth rate (%)**



Source: World Tourism Barometer  
 – Update, November 11, 2021  
 \*Estimated change compared to 2019



## **IV: TOURISM IN SICA MEMBER COUNTRIES**

## ► 4.1 Inbound Tourism



### VISITORS

A visitor is a traveler taking a trip to a main destination, for less than a year, for any purpose other than to be employed by a resident entity in the country or place visited. Statistically, visitors are the sum of all tourists plus all same-day visitors (excursionists) (OMT, 2018).



### TOURISTS

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 (excursionist). (WTO, 2018).



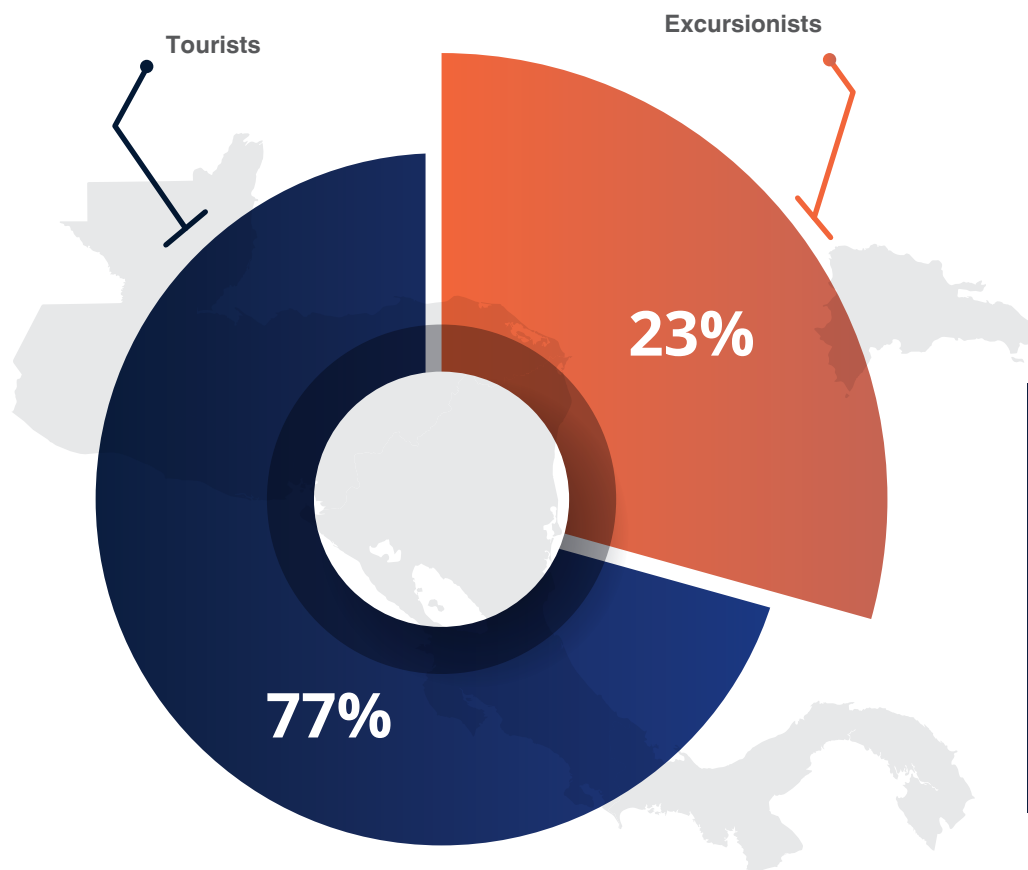
### EXCURSIONISTS

These are visitors who do not spend the night at their destination (also known as same-day visitors).



### ● 4.1.1. Visitors, tourists, and excursionist' arrivals

**Graph 4.1. Distribution of total visitors to the SICA region as a percentage of the total Year 2020**



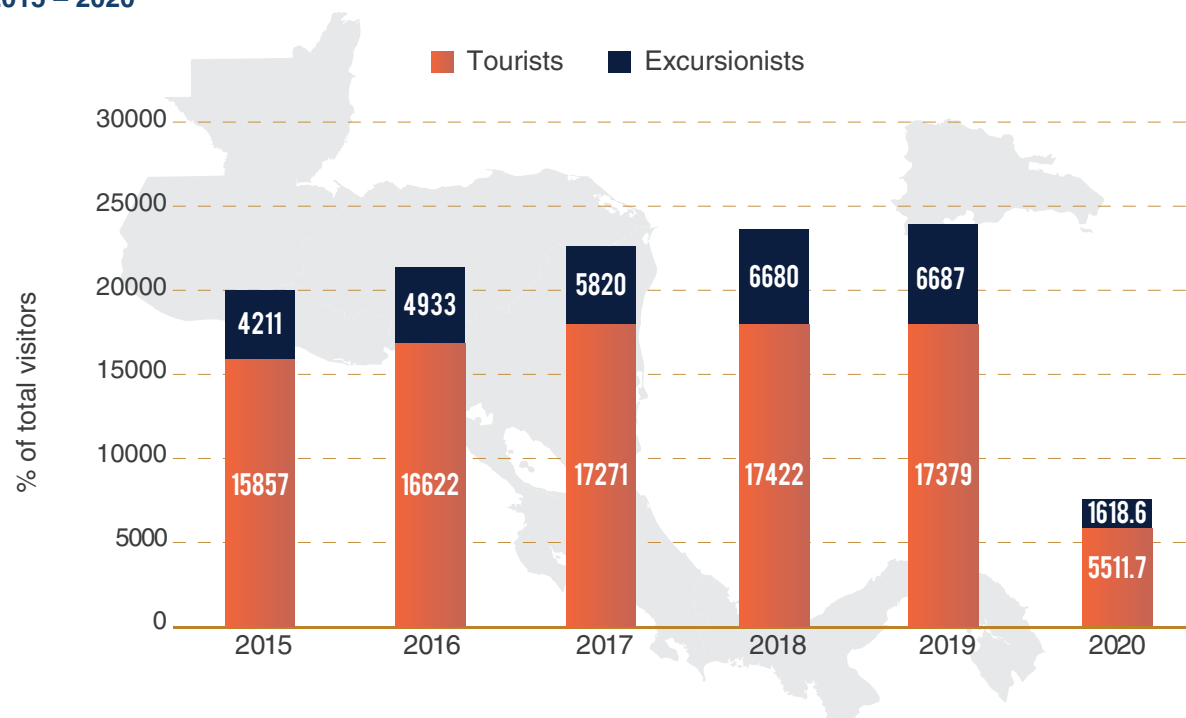
In 2020, 77% of the total number of visitors received were tourists, while 23% were excursionists. This historically common participation in the overall average does not apply to Belize and Honduras, countries that reported a higher participation of excursionists in 2020. In the case of Honduras, one of the countries that has best resisted the pandemic in terms of boosting of tourism services, it is mainly oriented to the promotion of domestic tourism.

According to National Tourism Authorities' Data on the countries in the SICA<sup>3</sup> region, between 2015 and 2019, the average growth rate of visitor arrivals was 4.9%, including a slight contraction of 0.15% in 2019. However, the behavior of visitor arrivals in 2020 is atypical and breaks with the series pattern.

<sup>3</sup>Member countries of the Central American Integration System (SICA): Belize; Costa Rica, El Salvador, Guatemala; Honduras; Nicaragua; Panama and Dominican Republic.

In 2020, visitor arrivals contracted by 70.4% in the eight countries of the SICA region. In 2020, contraction was 68.3% for tourists and 75.8% for excursionists.

**Graph 4.2. Percentage structure of visitors**  
SICA region  
2015 – 2020



Overall, the 7.1 million visitors that the SICA region received in 2020 represent only 29.6% of the number of visitors the region received in 2019, as can be seen in Graph 4.3. The events derived from the Covid-19 pandemic not only consolidated but worsened and seriously exacerbated the slowdown in tourist arrivals that the region had experienced in 2019.

**Graph 4.3. Year-on-year growth of visitors**  
**Percentage of variation (%)**  
**2015 – 2020**



Although Graph 4.3 describes a break in the average magnitudes of growth in visitor arrivals, as in previous years, the general behavior of the series can be described in terms of the effects on the main regions of origin of visitors traveling to the SICA region. Quarantines, travel restrictions, speculation, unemployment, capital relocation, and other constraints in North America, Europe, South America, and the Caribbean caused a sharp decline in visitor arrivals to the SICA region. For example, tourists originating from the Caribbean saw a 94% drop in tourist arrivals to the SICA region; tourists originating from South America dropped by 77%; tourists originating from Europe dropped by 70%, and tourists originating from North America dropped by 67%.

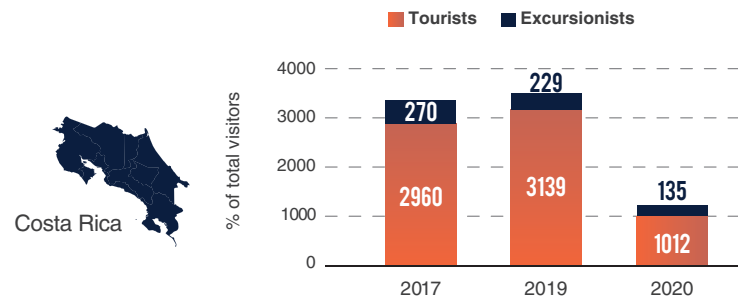
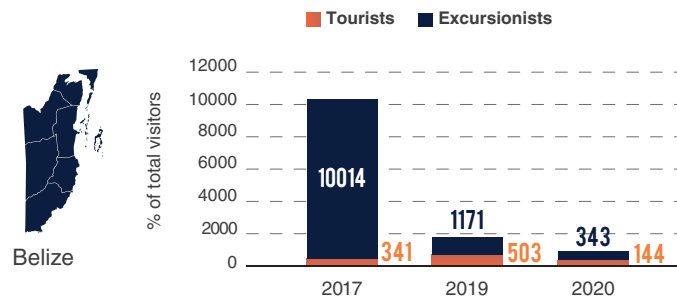
In terms of the seasonal pattern of tourist arrivals, Covid-19 caused a break in this pattern. As shown in Table 4.1., in 2020 all countries had a magnitude in tourist arrivals in line with the previous year during the first quarter. The magnitude of the decline in the second, third and fourth quarters is completely atypical and reflects the situation resulting from Covid-19.

**Table 4.1. Tourist arrivals by quarter**  
Thousands of people

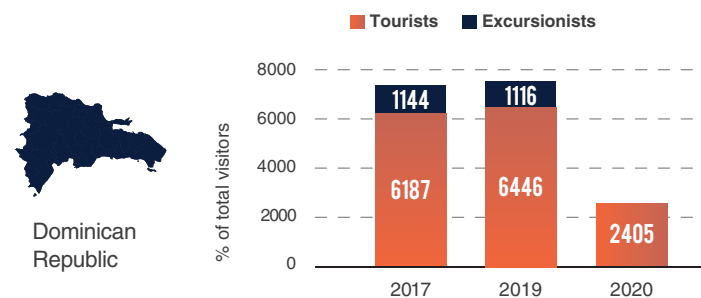
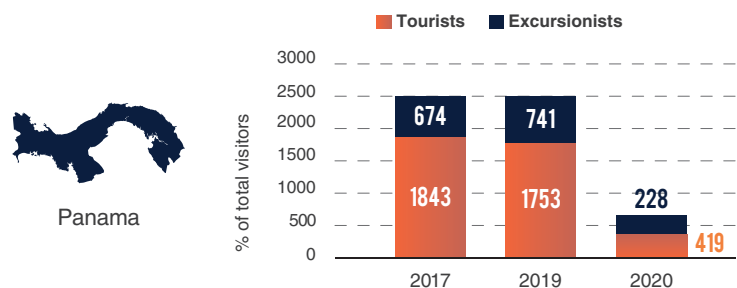
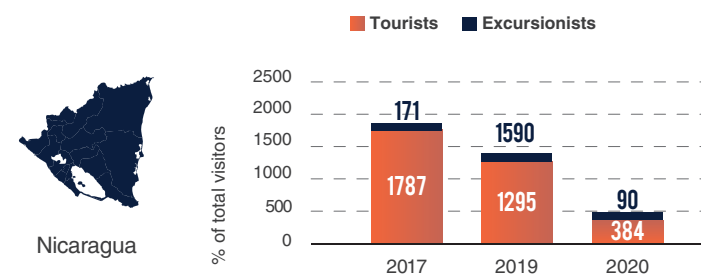
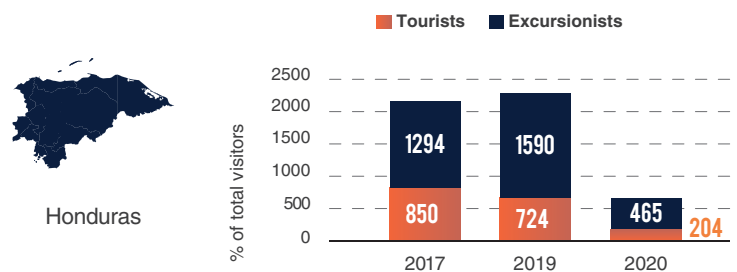
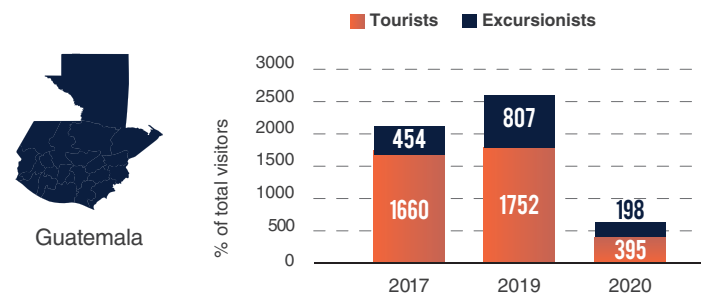
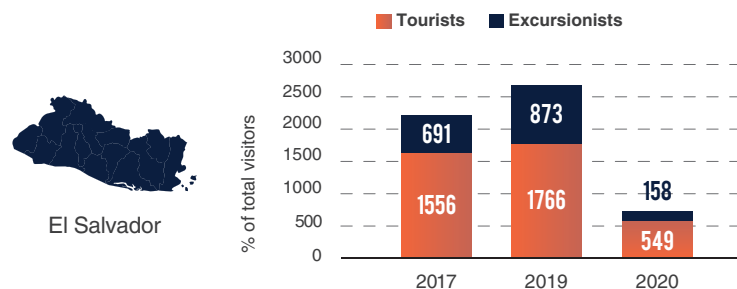
Year	Quarter	DR	BZ	CR	ES	GU	HO	NI	PA
2019	1st.	29%	31%	32%	23%	26%	23%	23%	31%
	2nd.	26%	25%	23%	24%	25%	26%	24%	22%
	3rd.	22%	20%	21%	26%	24%	25%	23%	23%
	4th.	23%	24%	24%	27%	25%	26%	30%	23%
2020	1st.	58%	86%	85%	62%	87%	77%	83%	85%
	2nd.	0%	1%	2%	0%	0.0%	0%	7%	0%
	3rd.	15%	1%	1%	1%	0.4%	4%	3%	0%
	4th.	28%	12%	12%	37%	13%	19%	7%	15%

Note: the green color indicates the quarter with the highest number of tourists

**Graph 4.4. Structure of visitors by country**  
Thousands of people  
Selected years



**Graph 4.4. Structure of visitors by country**  
Thousands of people  
Selected years



● 4.1.2. Cruise ship and passenger arrivals

### Cruise ship arrivals in 2020 to the SICA region



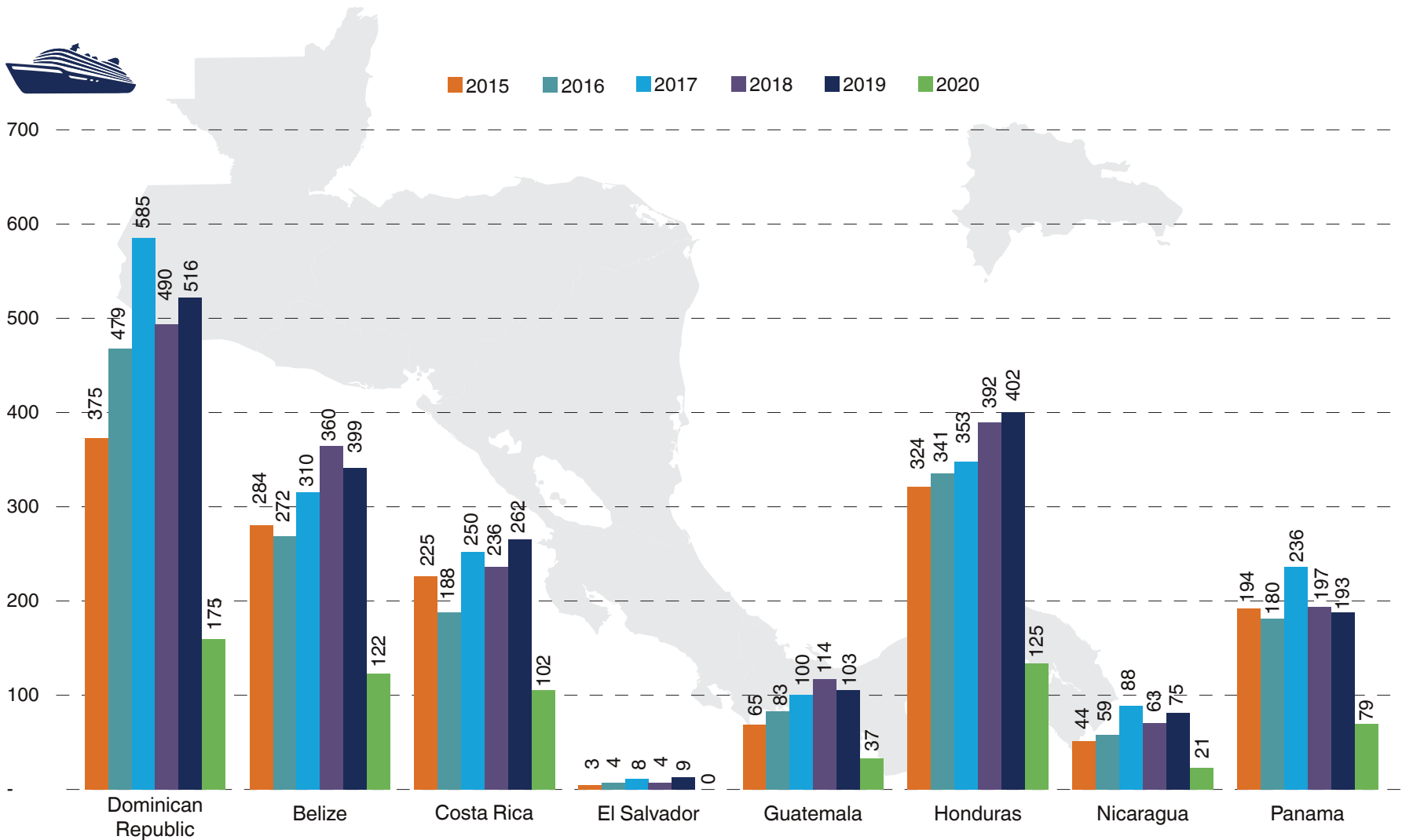
1277 fewer cruises than in 2019  
66% fewer cruises than the previous year

### Cruise passenger arrivals in 2020 to the SICA region

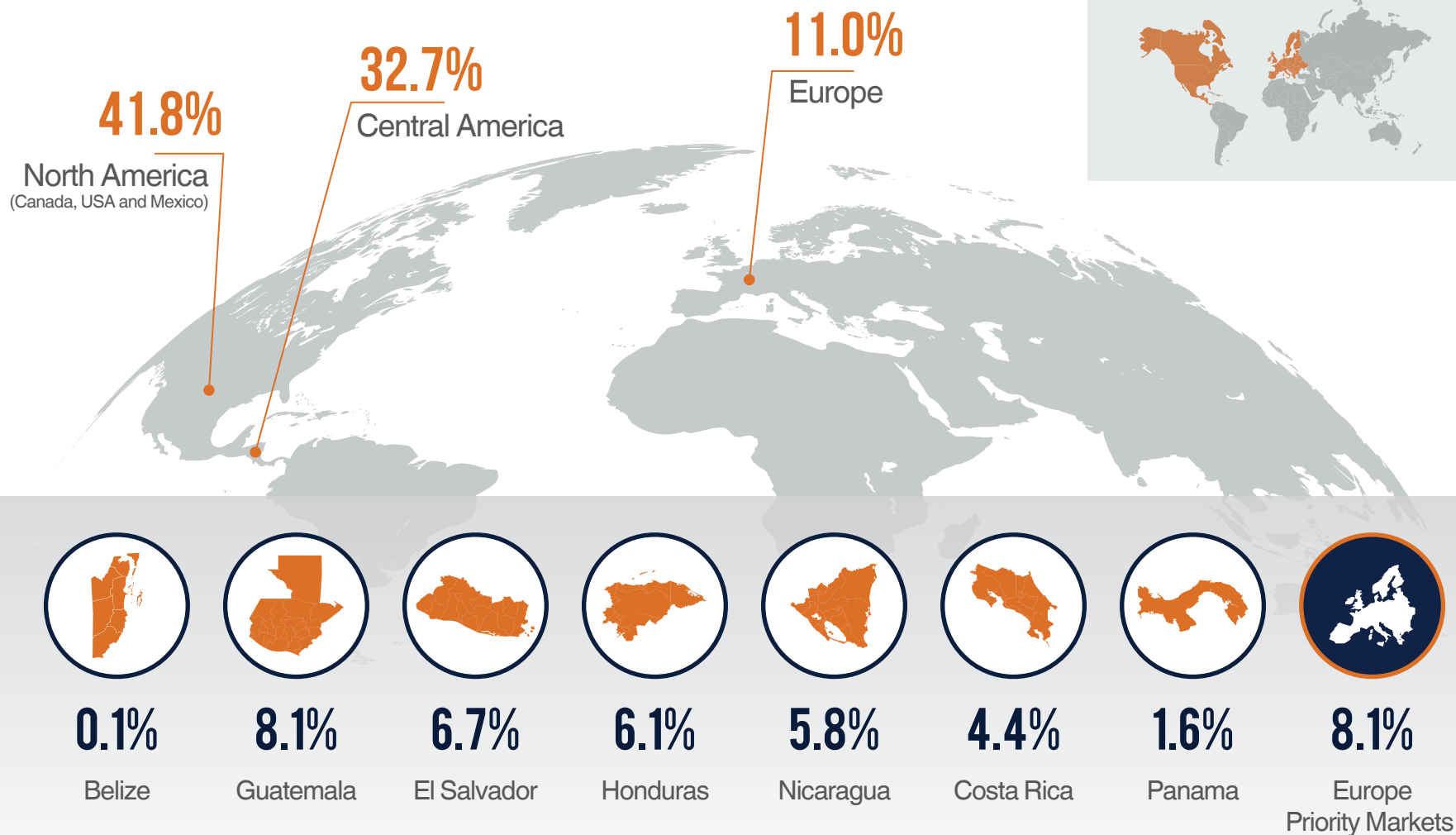


3.09 million fewer cruise passengers than in 2019  
69% fewer cruise passengers than in 2019

Graph 4.5. Cruise ship arrivals 2015 - 2020

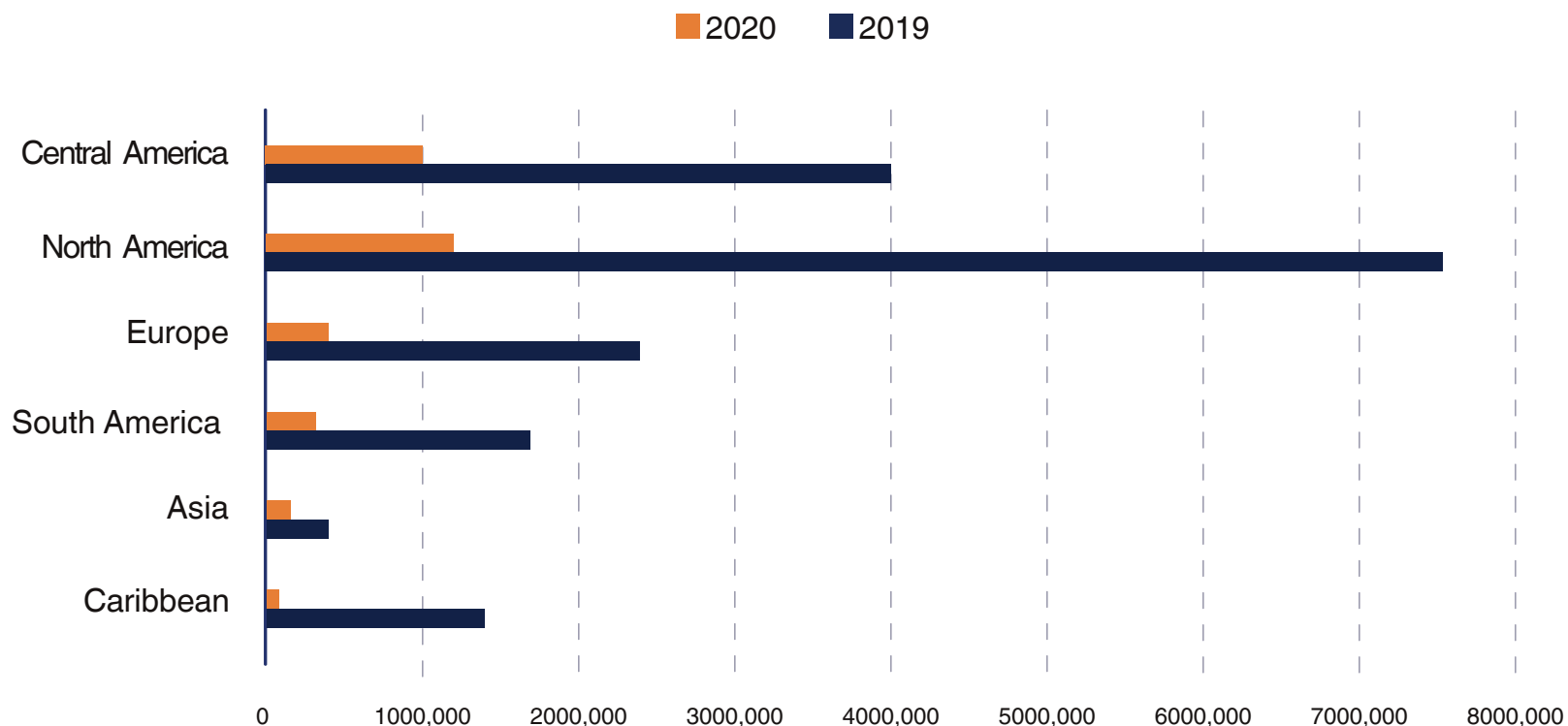


### ● 4.1.3. Tourists arrivals by region and country of origin



NOTE: As the time this report was being prepared no data were available for the Dominican Republic on tourist arrivals by region of origin.

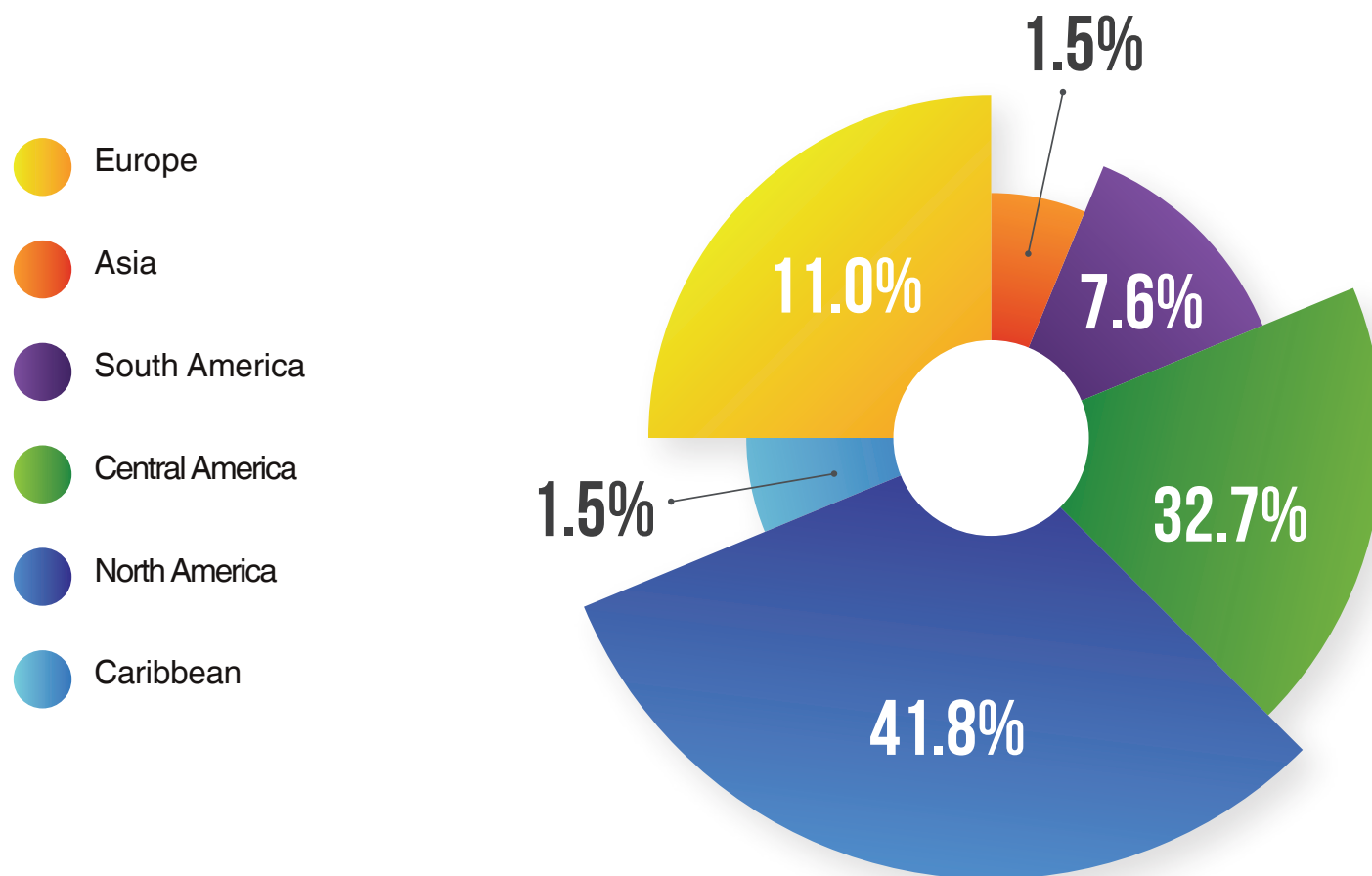


**Graph 4.6. Tourist arrivals by region of origin 2020 – 2019 (thousands)**

In 2020, tourist arrivals showed a contraction in all source markets.

\*Data for 2020 do not include the Dominican Republic, as data for this variable were not available at the time this report was being prepared.

**Graph 4.7. Leading source markets of tourists SICA region 2020 (participation in %)**



\* Data for 2020 do not include the Dominican Republic, as data for this variable were not available at the time this report was being prepared.

**Table 1. Ranking of tourists by country of origin**  
**Percentage of total tourist arrivals**

	COUNTRIES Y/O	Total	Participants
#01	United States of America	1129297.37	<b>36.4%</b>
#02	Guatemala	250628.335	<b>8.1%</b> <i>Intra-regional market</i>
#03	El Salvador	208947.781	<b>6.7%</b> <i>Intra-regional market</i>
#04	Canada	194828.172	<b>6.3%</b>
#05	Honduras	188975.401	<b>6.1%</b> <i>Intra-regional market</i>
#06	Nicaragua	181575.877	<b>5.8%</b> <i>Intra-regional market</i>
#07	Costa Rica	135093.581	<b>4.4%</b> <i>Intra-regional market</i>
#08	Colombia	78085.0166	<b>2.5%</b>
#09	Mexico	74073.5901	<b>2.4%</b>
#10	France	62581.6954	<b>2.0%</b> <i>Market prioritized by CATA</i>
#11	Germany	54469.8775	<b>1.8%</b> <i>Market prioritized by CATA</i>
#12	Panama	48502.9877	<b>1.6%</b> <i>Intra-regional market</i>
#13	Spain	47078.343	<b>1.5%</b> <i>Market prioritized by CATA</i>
#14	UK	41425.7407	<b>1.3%</b> <i>Market prioritized by CATA</i>
#15	Venezuela	34874.9661	<b>1.1%</b>
#16	Cuba	34658.3813	<b>1.1%</b>
#17	Argentina	29046.8954	<b>0.9%</b>
#18	Brasil	28446.2789	<b>0.9%</b>
#19	Italy	23199.4612	<b>0.7%</b> <i>Market prioritized by CATA</i>
#20	Netherlands	23038.9219	<b>0.7%</b> <i>Market prioritized by CATA</i>
#21	Peru	22107.4384	<b>0.7%</b>
#22	Switzerland	16637.758	<b>0.5%</b> <i>Non-traditional emerging market</i>
#23	Ecuador	15873.2336	<b>0.5%</b>
#24	Chile	14968.2561	<b>0.5%</b>
#25	Israel	8811.27228	<b>0.3%</b>
#26	Australia	8607.38265	<b>0.3%</b>
#27	China	7548.70224	<b>0.2%</b>
#28	Sweden	7469.34088	<b>0.2%</b>
#29	Belgium	7281.30099	<b>0.2%</b> <i>Non-traditional emerging market</i>
#30	Poland	7126.66432	<b>0.2%</b>
#31	Philippines	7113.32691	<b>0.2%</b>
#32	India	7042.66194	<b>0.2%</b>
#33	Austria	6199.63541	<b>0.2%</b>
#34	Russia	5902.93483	<b>0.2%</b> <i>Non-traditional emerging market</i>
#35	Dominican Republic	5762.36278	<b>0.2%</b> <i>Intra-regional market</i>
#36	Belize	2034.37512	<b>0.1%</b> <i>Intra-regional market</i>

	COUNTRIES Y/O	Total	Participants
#37	Rep. South Korea	5690.17796	<b>0.2%</b>
#38	Denmark	5606.89562	<b>0.2%</b>
#39	Japan	5213.23982	<b>0.2%</b>
#40	Czech Rep.	5016.79485	<b>0.2%</b>
#41	Uruguay	4597.72357	<b>0.1%</b>
#42	Bolivia	4398.76366	<b>0.1%</b>
#43	Portugal	4197.65409	<b>0.1%</b>
#44	Ireland	2590.67095	<b>0.1%</b>
#45	Norway	2548.19472	<b>0.1%</b>
#46	Romania	2255.76569	<b>0.1%</b>
#47	Hungary	2050.8918	<b>0.1%</b>

Historical market shares were maintained in 2020 despite the severe disruption caused by the Covid-19 pandemic. The intra-regional market and the United States and Canada accounted for 73.7% of all tourists arriving in the region in 2020. On the other hand, the six European priority markets (Germany, Spain, France, Italy, the Netherlands, and the UK ) represent only 8.1% of the total number of tourists received by the region. Finally, concerning the three emerging non-traditional markets (Russia, Switzerland and Belgium), tourists from these three countries accounted for only 1%.

<sup>4</sup>Excluding the Dominican Republic, Belize and Panama

#### Graph 4.8. Tourist arrivals Prioritized countries in the European market 2020

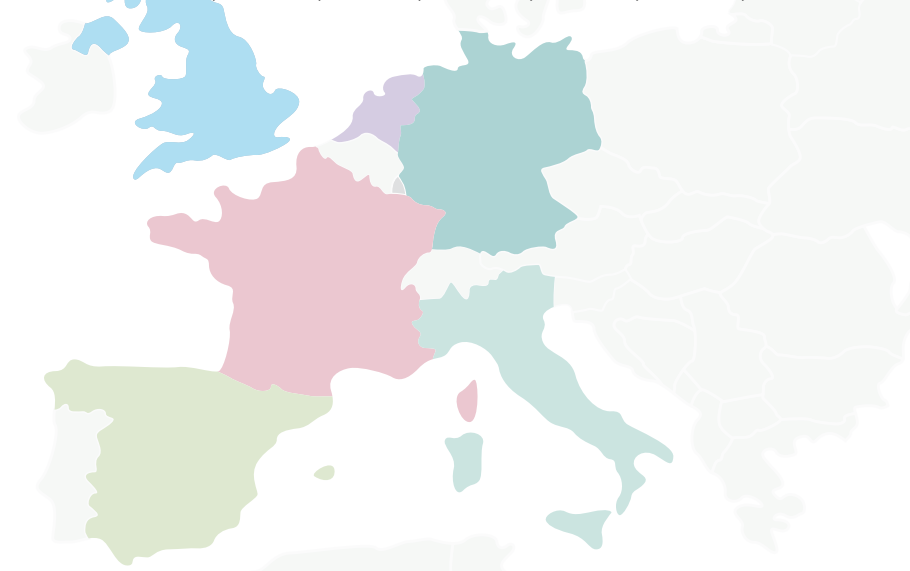
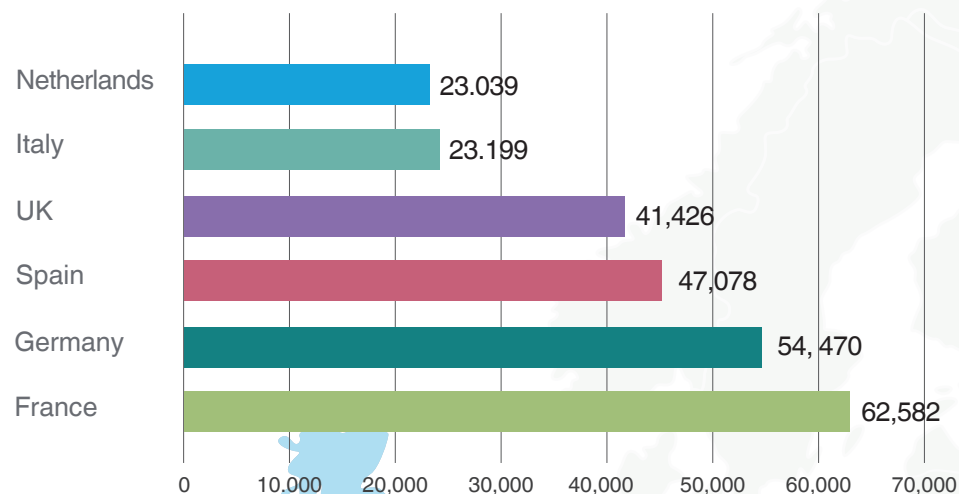
As mentioned earlier, the three non-traditional emerging markets (Russia, Switzerland and Belgium) accounted for only 1% of the total number of tourists received in 2020. Of the six priority markets in Europe, France is the country of origin that reported the highest number of tourists (62,582), followed by Germany (54,470); Spain (47,078) and the United Kingdom (41,426). Italy and the Netherlands contributed less than 30,000 tourists each (23,199 and 23,039, respectively).

Note: Data in graph 4.8 does not include arrivals to the Dominican Republic.

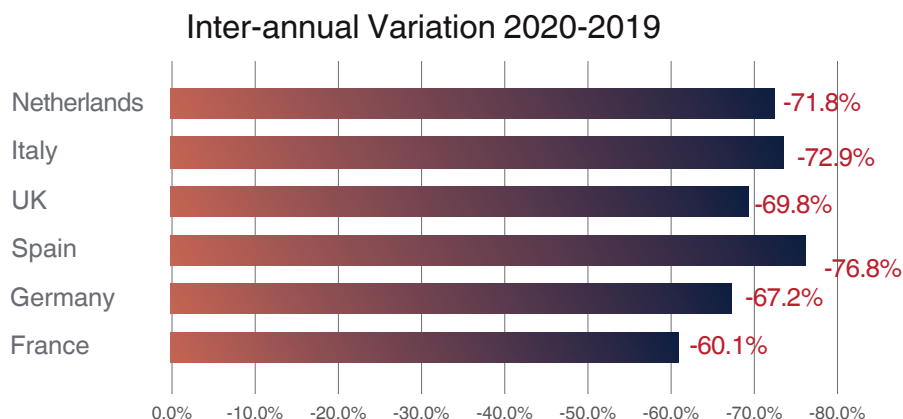
**Table 2: Ranking of tourists received**  
**Prioritized countries in the European market**  
**2020**

	Rank.	Country	Total
Tourists from the six priority countries in the European market	<b>#01</b>	France	62,582
	<b>#02</b>	Germany	54,470
	<b>#03</b>	Spain	47,078
	<b>#04</b>	UK	41,426
	<b>#05</b>	Italy	23,199
	<b>#06</b>	Netherlands	23,039
<b>278,794</b>			

**Graph 8: Tourist arrivals**  
**Prioritized countries in the European market 2020**



**Graph 4.9. Tourist arrivals. Prioritized countries in the European market. Inter-annual variation 2019-2020**



\*Data for 2020 does not include arrivals to the Dominican Republic. The inter-annual variation was estimated by eliminating the Dominican Republic from the year 2019 as well, in order to reach a balanced comparison. As shown in graph 4.9, the adversities that the Covid-19 pandemic brought to the region had a strong effect on tourist flows from priority European markets, as these fell by 69.7%.<sup>5</sup>

#### 4.1.4. Tourists arrivals by route of entry

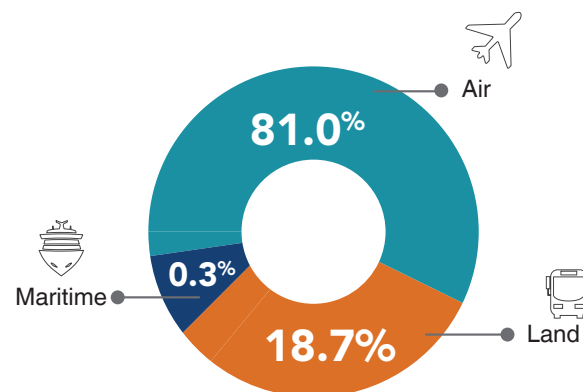
In 2020, the main access route used by tourists visiting the SICA region continued to be by air. This route received 81% of tourist arrivals. In 2019, air travel was also the most used access route, accounting for 71% of all tourist arrivals. In numeric terms, 4.465 million tourists came by air in 2020.

while in 2019, 13,340.4 thousand tourists entered by this route, representing a drop of -66.5%

In the second place, with 18.7% of tourist arrivals in 2020, are arrivals by land, typical of intra-regional tourists from the Central American area. This route accounted for 19% of tourist arrivals in 2019. In terms of the number of tourists entering by land, in 2020, there were 1.032 million and tourists, while in 2019, 3.578 million tourists entered by land, which would represent a drop of 71.2%.

\*Data for 2020 does not include arrivals to the Dominican Republic. The inter-annual variation was estimated by eliminating the Dominican Republic from the year 2019 as well, in order to reach a balanced comparison.

As shown in graph 4.9, the adversities that the Covid-19 pandemic brought to the region had a strong effect on tourist flows from priority European markets, as these fell by 69.7%.<sup>5</sup>



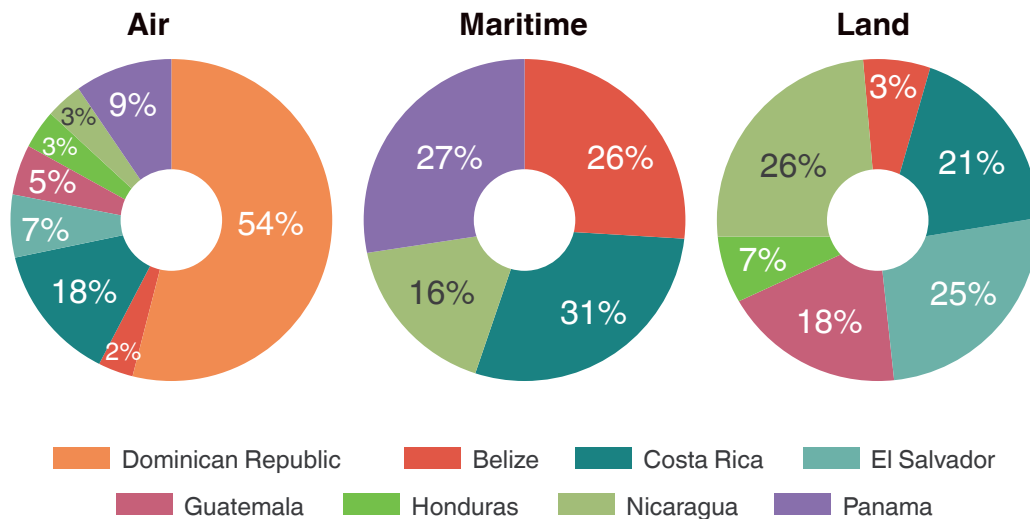
<sup>5</sup>The estimated rate of change compensates for the absence of data for the Dominican Republic in 2020.

### Graph 4.10. Country participation in tourist arrivals by route of entry (2020) Percentage of the total for each entry route

Notwithstanding the effects of the pandemic, the structure of tourist arrivals by mode of entry remained the same throughout the region. In 2020, the Dominican Republic continued to position itself as the SICA country with the largest participation in tourist arrivals by air, accounting for 54% (48% in 2019). In second place was Costa Rica with 17.7% (18.1% in 2019), and in third place Panama with 9.3% (14.2% in 2019). The results are not only in line with the historical patterns but also make macroeconomic sense when considering that these three countries are the great tourist powerhouses in the region, having achieved remarkable advances in air connectivity and a well-established offer of beach and nature tourism.

Regarding tourist arrivals by land, it should first of all, be taken into account that this route is mainly used among the so-called CA5, the group of countries made up of El Salvador, Guatemala, Honduras, Nicaragua, and Costa Rica. The country with the highest participation was El Salvador, with 24.8% of the total (28% in 2019). Costa Rica was a close second, with 21% (0.32% in 2019), while Guatemala came in third at 18.4% (31% in 2019). It should be noted that Guatemala and El Salvador are members of the Central American Free Mobility Agreement (CA-4). They are countries that have historically had significant migratory flows between them. In the case of Costa Rica, it is also worth remembering that its capital, San José, is directly on the route of the Pan-American Highway and is well connected to the rest of the region, being a point of mobility and migratory attraction for Nicaraguans.

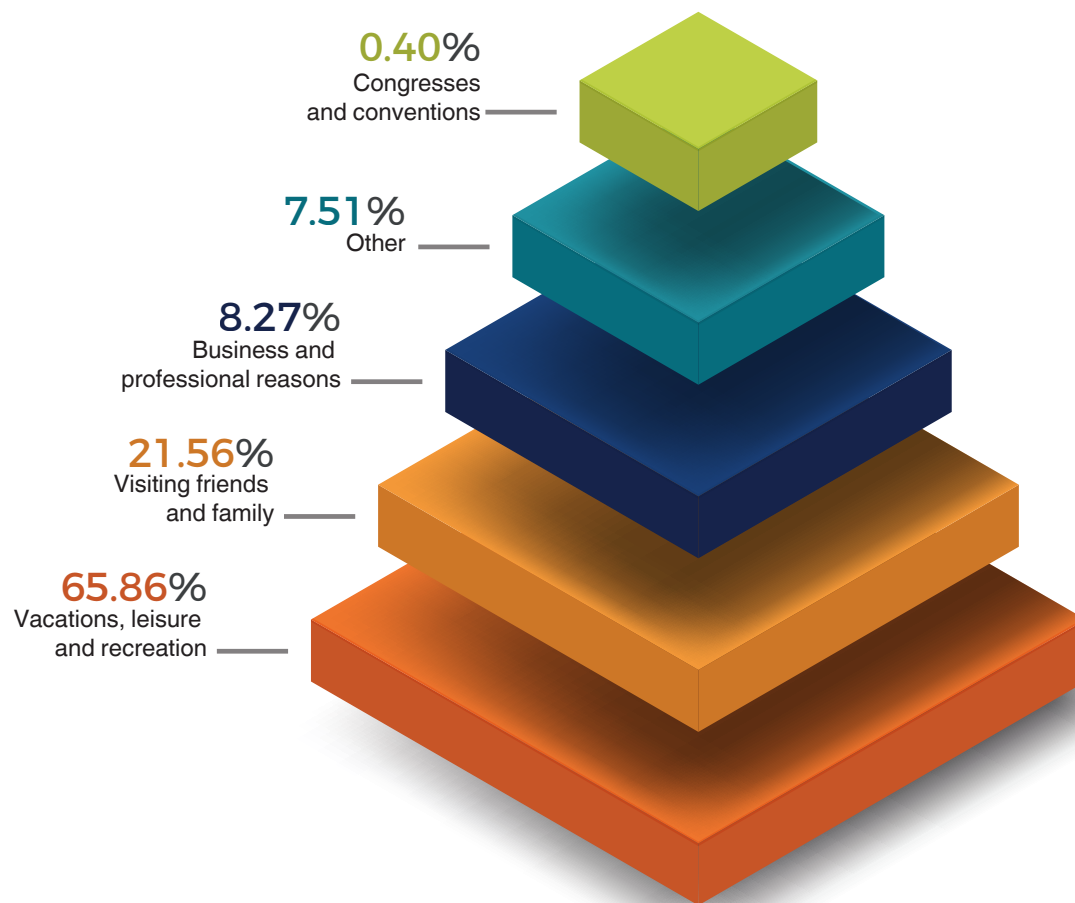
Finally, in terms of tourist arrivals by maritime means, in many countries of the SICA region, maritime tourist arrivals collapsed almost entirely. Costa Rica was first, with a participation of 30.6% of the total received (36.3% in 2019). The second country in importance for maritime arrivals was Panama, with 26.7% (1% in 2019). Finally, the third country in volume for maritime arrivals was Belize, with a total participation of 26.2% (0.6% in 2019). However, it is important to note that the Dominican Republic did not report this data for 2020, which explains why in percentage terms Central American participation increased significantly from the previous year.



#### ● 4.1.5. Travel motivation for inbound tourism trips

According to surveys conducted by the National Tourism Authorities (NTA's), in 2020, the main reasons for travel by tourists visiting the SICA region were vacations and leisure at 65.9%, followed by visiting friends and family at 21.56%, and business and professional reasons with 8.3%. As is traditional, congresses and conventions are in last place with only 0.4%. Undeclared reasons, i.e. "other", represent 7.5%.

Although the hierarchy of travel motives remained the same, it is worth noting that compared to 2019, during 2020 travel for visiting friends and family and travel for business and professional reasons increased in importance compared to 2019, while vacation, leisure, and recreation decreased in volume. The above makes sense considering widespread fear regarding the health risks associated with Covid-19.



### Table 2. Inbound tourism travel motives Percentage distribution by country 2019 - 2020

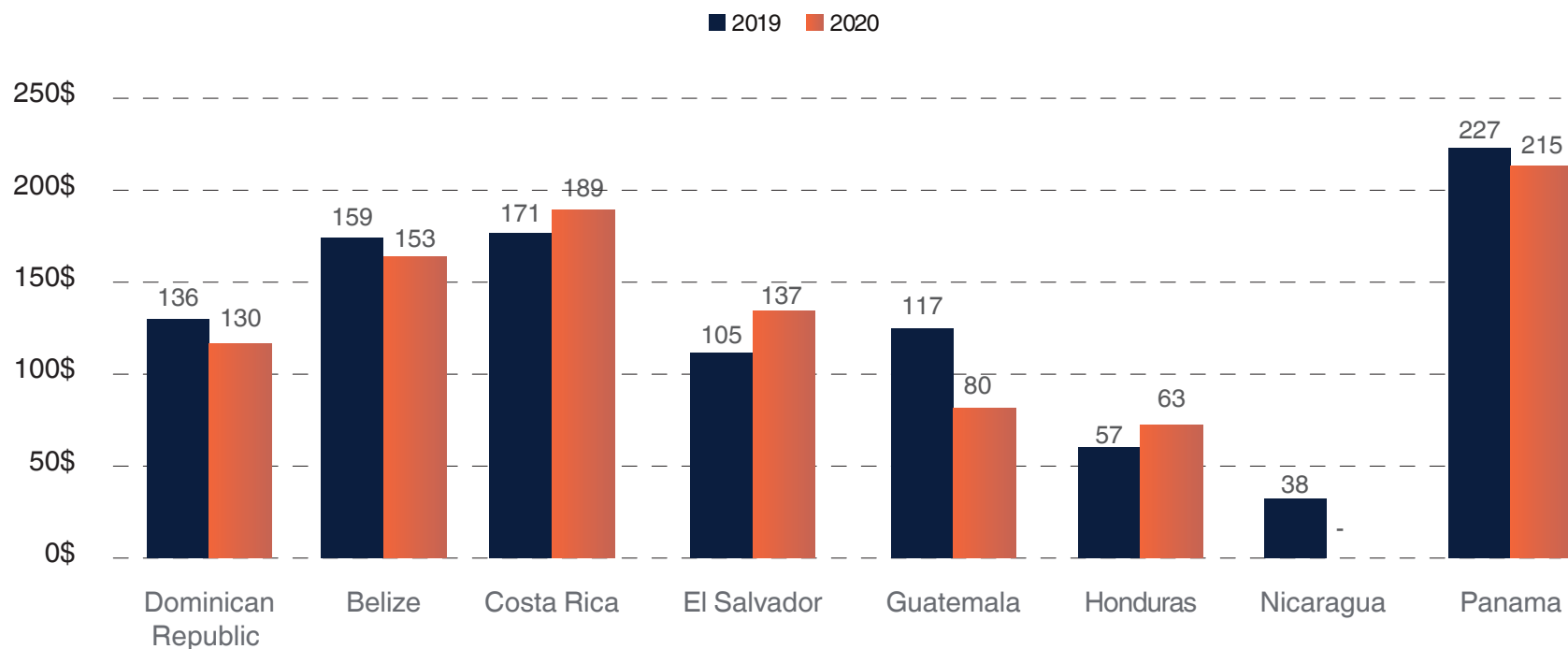
Year	Motive	DR	BZ	CR	ES	GU	HO	NI	PA
2019	Congresses and conventions	0%	0%	1%	1%	1%	0%	0.5%	2%
	Business and professional reasons	1%	2%	5%	5%	15%	14%	14.4%	5%
	Vacations, leisure and recreation	95%	95%	80%	41%	54%	77%	28.5%	71%
	Visiting friends and family	3%	2%	10%	52%	20%	0%	48%	0%
	Other	1%	1%	5%	1%	11%	9%	9.1%	22%
2020	Congresses and conventions	0%	0%			0%		0.1%	2%
	Business and professional reasons	4%	6%			15%	10%	9.4%	6%
	Vacations, leisure and recreation	89%	91%			39%	81%	25.2%	69%
	Visiting friends and family	7%	2%			39%		60%	1%
	Other	1%	1%			7%	9%	5.7%	22%
		100%	100%	0%	0%	100%	100%	100%	100%
<div></div> Main reason Source: NTA									



#### ● 4.1.6. Average daily expenditure

The average daily expenditure in 2020 was US\$ 138 dollars,<sup>7</sup> compared to US\$ 126 dollars in 2019. In 2020, the situation derived from Covid-19 caused a non-homogeneous behavior in the average daily expenditure variable. For example, in the cases of the Dominican Republic, Belize, Guatemala, and Panama<sup>7</sup>, the average daily expenditure decreased; however, in Costa Rica and El Salvador, the average daily expenditure showed a significant increase.

**Graph 4.11: Tourist daily expenditure 2019 and 2020**  
Current dollars per day



Note: Nicaragua data not available for 2020. This average does not include tickets.

<sup>7</sup>Excluding Nicaragua, for which data were not available at the date of finalization of this report.

#### 4.1.7. Average nightly stay

In the tourism context caused by Covid-19, it stands out that, mainly in the Dominican Republic and El Salvador, in 2020 there was an increase in the average number of overnight stays. For the region as a whole, there was a slight drop, from an average of 9 nights in 2019 to 8.7 nights.<sup>8</sup> The increase in the number of overnight stays in some countries is explained by travel restrictions and new costs associated with travel, making travel activity less frequent and less agile than in previous years.

On the other hand, there was a clear decrease in the number of average nights in Guatemala and Honduras, while in Panama, there was no variation.

Graph 4.12: Average overnight stays for 2019 and 2020



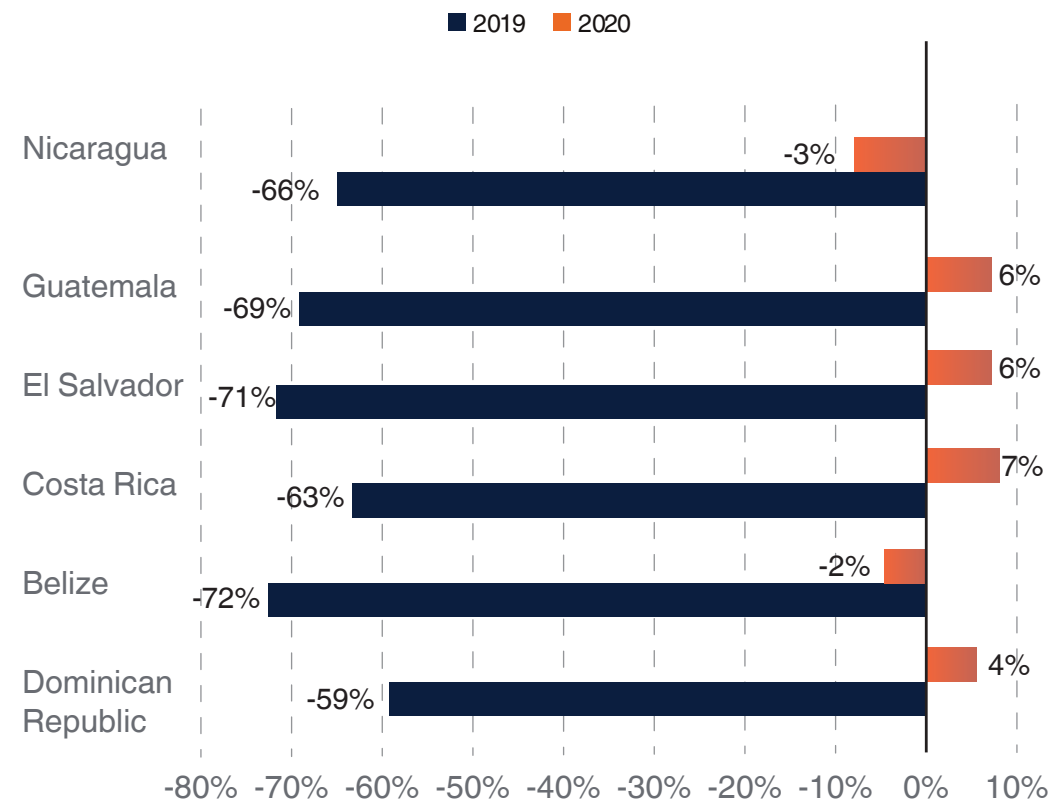
<sup>8</sup>Excluding Nicaragua, whose data were not available at the finalization of this report.

## ► 4.2 Outbound tourism

### ● 4.2.1. Tourist departures

According to official figures from the National Tourism Authorities of the countries in the SICA region, the number of tourists leaving the region in 2020 was 1.92 million. This figure represents a downward variation of 3.92 million tourists, equivalent to 67% when compared to the 2019 figure of 5.85 million tourists leaving the region. From the six countries of the SICA region for which information is available, Belize and El Salvador are the countries that in 2020 recorded the most severe contraction in tourist departures, with 72% and 71%, respectively. At the other extreme, the Dominican Republic saw the least severe contraction at 59%.

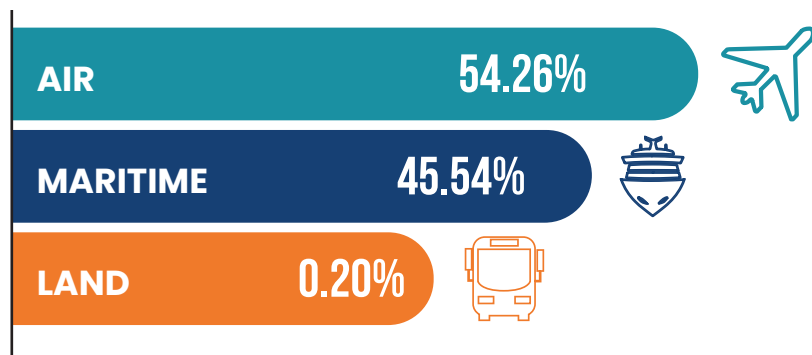
**Graph 4.13: Tourist Departures 2020  
2019 and 2020**  
Thousands of tourists



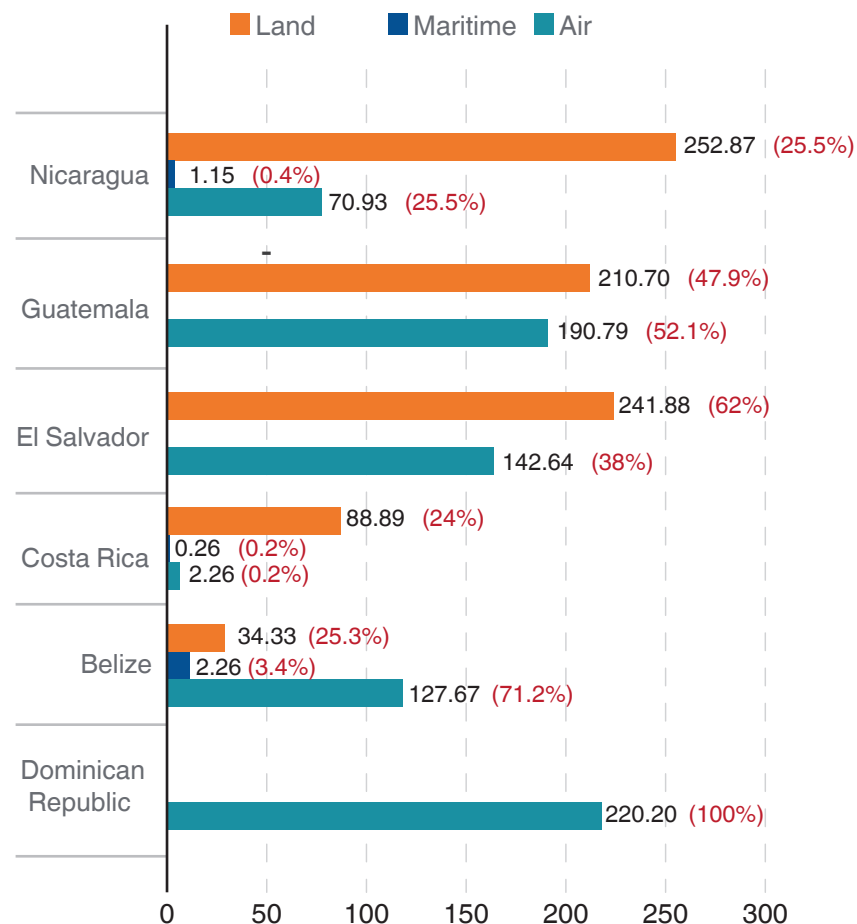
Note: Honduras and Panama do not report this data.

### 4.2.2. Departure routes for outbound tourism

In 2020, the means of transportation used by tourists originating from SICA region countries maintained their levels of participation, showing patterns in line with their historical behavior. In 2020, air travel accounted for 54.26% of all tourist departures, land travel accounted for 45.54%, and maritime travel accounted for only 0.20% of tourist departures. Despite this general trend, connectivity conditions and income levels can cause particular behaviors in the countries. For example, for El Salvador, Guatemala, and Nicaragua, all CA4 member countries, the predominant route for tourist departures is by land, linked to historically high intra-regional tourist flows. For Costa Rica, which is currently the only Central American member of the Organization for Economic Cooperation and Development (OECD), the main tourist departure route is by air. In the case of Belize and the Dominican Republic, the main departure route is also by air, unlike the case of Costa Rica, the reason is entirely geographic.



**Graph 4.14: Tourist departures<sup>10</sup> by means of transportation**  
Thousands of tourists and their relative weight by country



<sup>10</sup> Excludes Panama and Honduras

<sup>11</sup> Cut at December 2021, only Guatemala and Nicaragua had reported data on outbound tourism travel motives.

● Travel motivation for Outbound tourism travel



**Congresses and  
conventions**

**1%**



**Vacation, leisure  
and recreation**

**5%**

**Other**

**18%**



**Business and  
professional reasons**

**21%**



**Visiting friends and family**

**46%**

(Data from Costa Rica and El Salvador are missing).  
Excludes Panama and Honduras.  
In December 2021, only Guatemala and Nicaragua had  
reported data on outbound tourism travel motives.

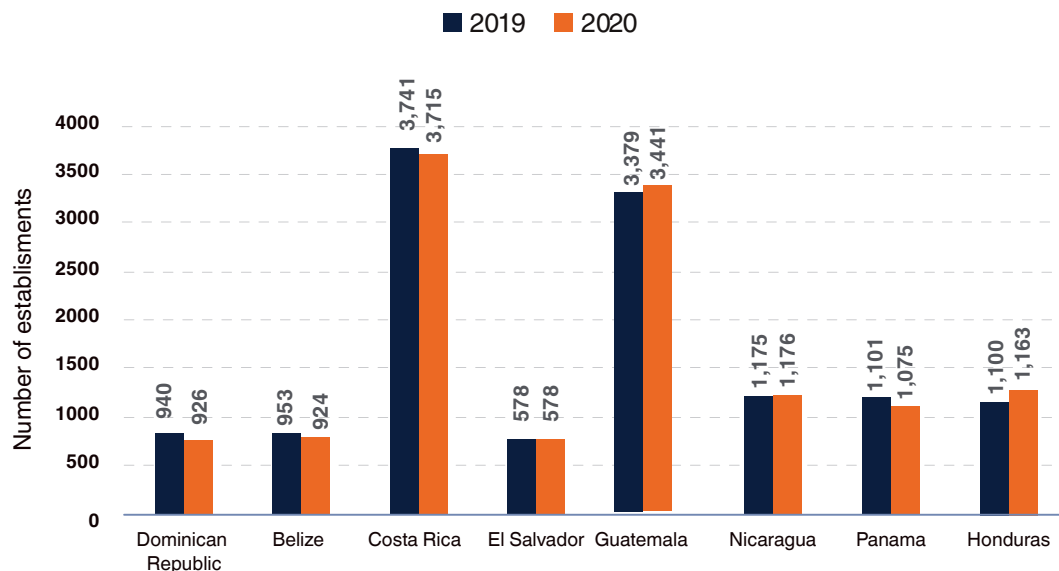
### ► 4.3. TOURISTIC OFFER

#### ● 4.3.1. Accommodations

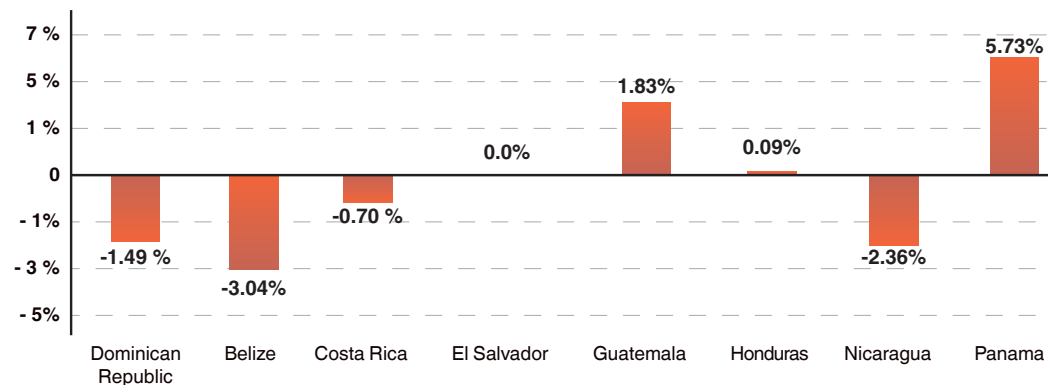
##### — 4.3.1.1. Number of establishments

**Graph 4.15: Number of accommodation establishments by country 2019-2020**

At the end of 2020, the National Tourism Authorities (ANT's) of the SICA member countries reported they provided 12,998 accommodation services, which represents a slight increase of 0.24% over the previous year, when 12,967 establishments were registered. In the pandemic context, the countries that led to this increase in establishments were mainly Guatemala and Panama.



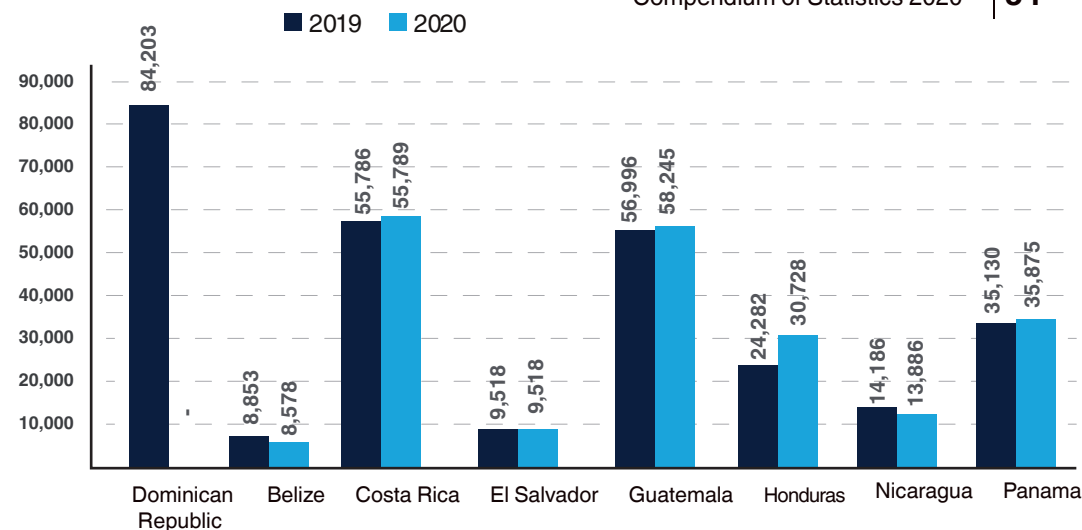
**Graph 4.16: Number of accommodation establishments  
Inter-annual variation 2020-2019**



### 4.3.1.2. Number of rooms

For the year 2020, according to the National Tourism Authorities (NTA's) of the SICA member countries, the number of rooms available in the different countries of the region saw heterogeneous behavior, with some countries indicating small increases, while in others it decreased.

**Graph: 4.17: Number of rooms for tourist accommodation at country level 2020-2019**

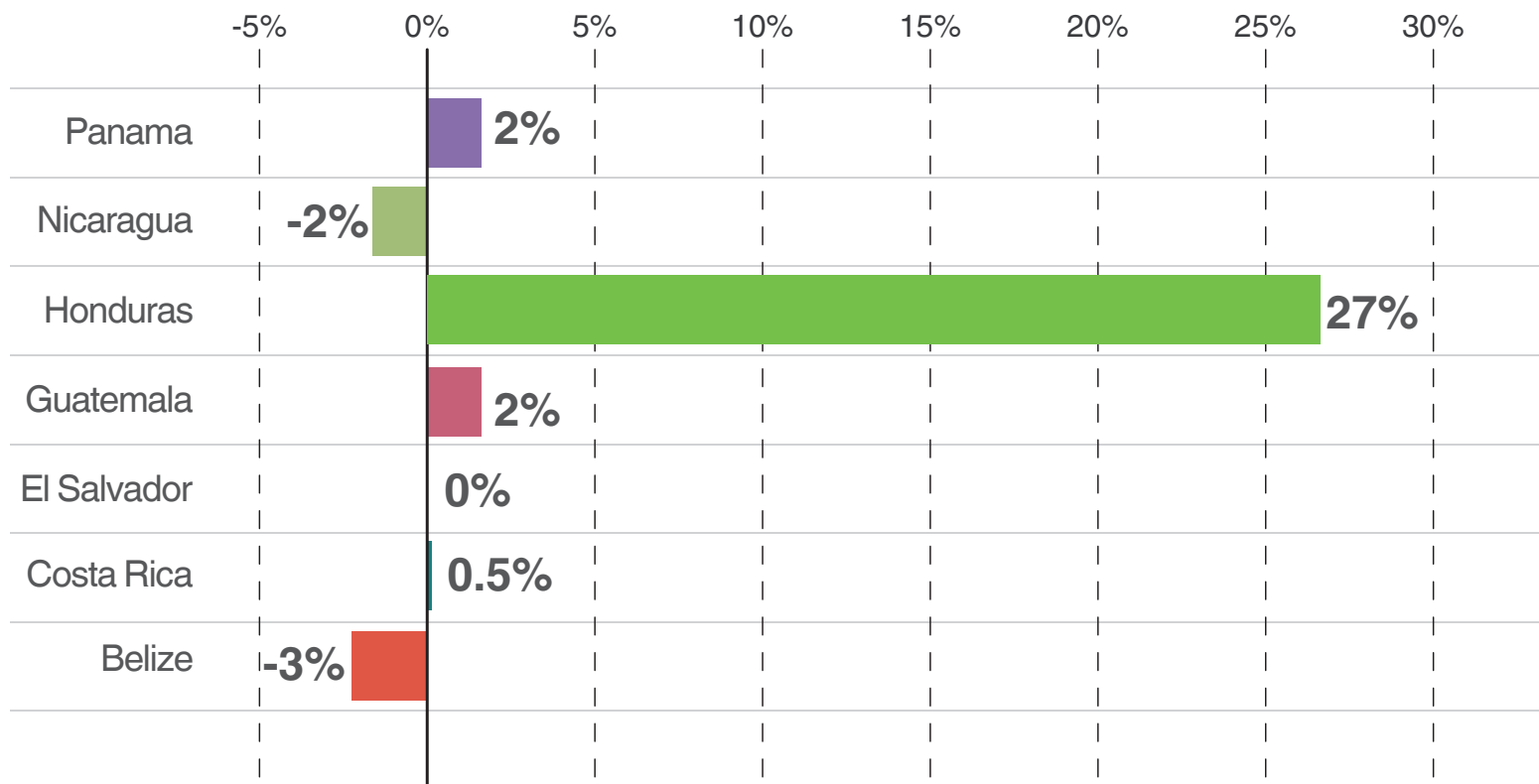


Note: Data for the Dominican Republic were not available at the date of preparation of this report.

As for the inter-annual variation in the number of rooms described in Graph 4.18, at the date of preparation of this report, information was available for all the SICA region countries except the Dominican Republic. The behavior of individual countries can be described as follows: the number of rooms grew in Panama, Honduras, and Guatemala, with 2%, 27%, and 2%, respectively. In these three countries, especially Honduras, the increase in the number of rooms is explained by the promotion of domestic tourism in the pandemic context and by a partial displacement of the labor force, which faced with the adversities of the pandemic context, turned to self-employment, favoring the tourism sector as the main sector in which to work.

The number of rooms remained constant in El Salvador and Costa Rica, with no variation in both cases. Although far from the tangible increases in Panama, Honduras, and Guatemala, this performance is favorable because it indicates the resilience of these countries' tourism industries in the face of external shocks.

The number of rooms declined in Nicaragua and Belize by 2% and 3%, respectively. In these countries, the fall in international tourist arrivals, together with the adversities of their local markets, caused an understandable and slight drop in the supply of rooms.

**Chart 4.18: Room supply at the country level Inter-annual variation 2020-2019**

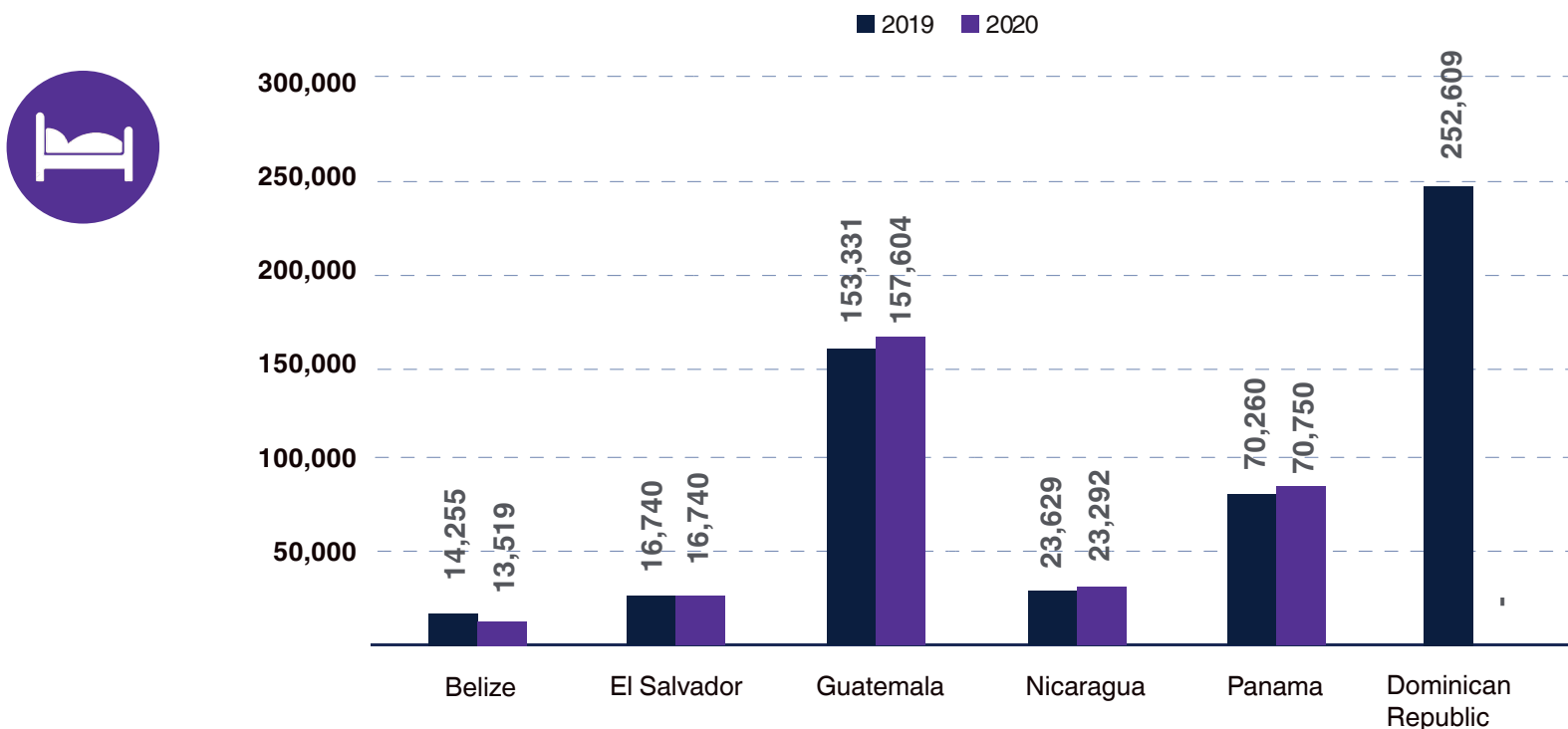
Note: At the date of preparation of this report, no data were available for the Dominican Republic



### 4.3.1.3. Number of beds

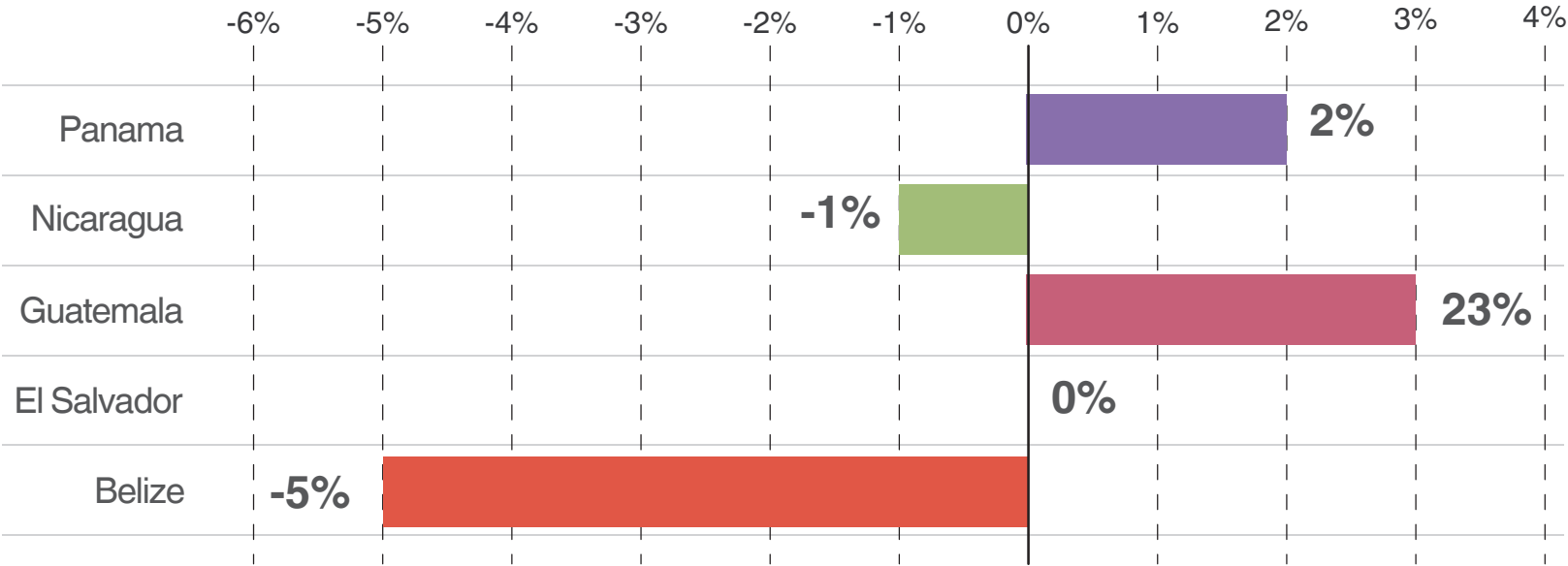
At the end of 2020, the SICA region reported an accommodation offer of 282,905 beds. Excluding data from Honduras, Costa Rica, and the Dominican Republic, this translates into a decrease of 47% compared to 2019. The countries with a significant reduction in the number of beds were Belize and Nicaragua, which is linked to the global effects of the pandemic, traveler behavior, and the closure of establishments. The increase led by Guatemala and Panama, as shown in Graph 4.19., reflects the rise in the number of establishments providing accommodation.

**Graph 4.19: Number of beds in available at country level 2020-2019**



Note: At the date of preparation of this report, no data were available for the Dominican Republic.

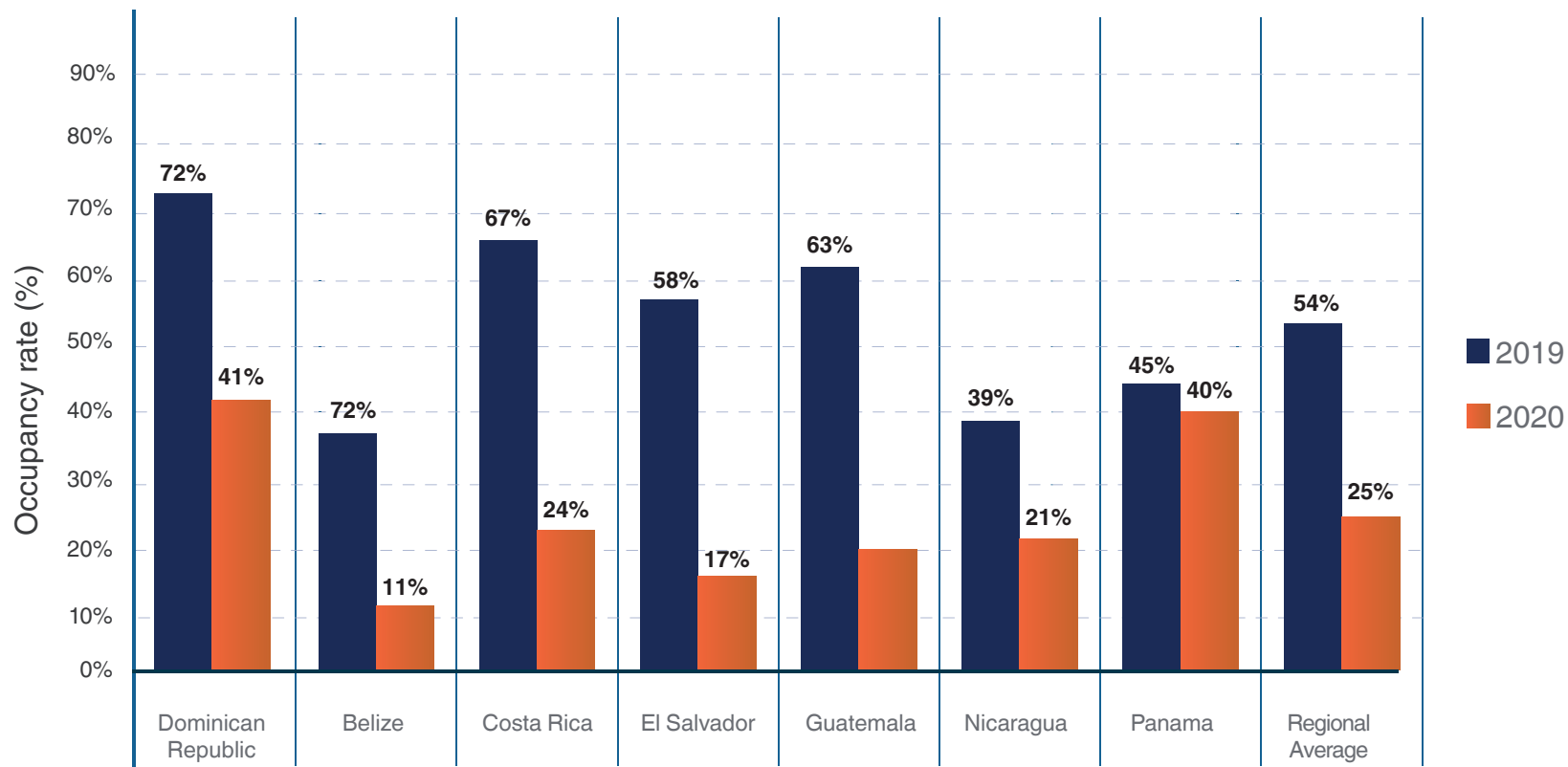
Graph 4.20: Bed Supply  
Inter-Annual Variation  
2020-2019



#### 4.3.1.4. Hotel occupancy

In all countries, there was a drop in hotel occupancy levels. Except for Honduras, in 2020 the average hotel occupancy for the region was 25% of total capacity. At the regional level, occupancy fell by 30% compared to the previous year's figure of 54% occupancy. The countries with the largest contraction in hotel occupancy were El Salvador and Guatemala (43%), followed by the Dominican Republic (31%).

**Graph 4.21: Hotel Occupancy Rate 2020-2019**

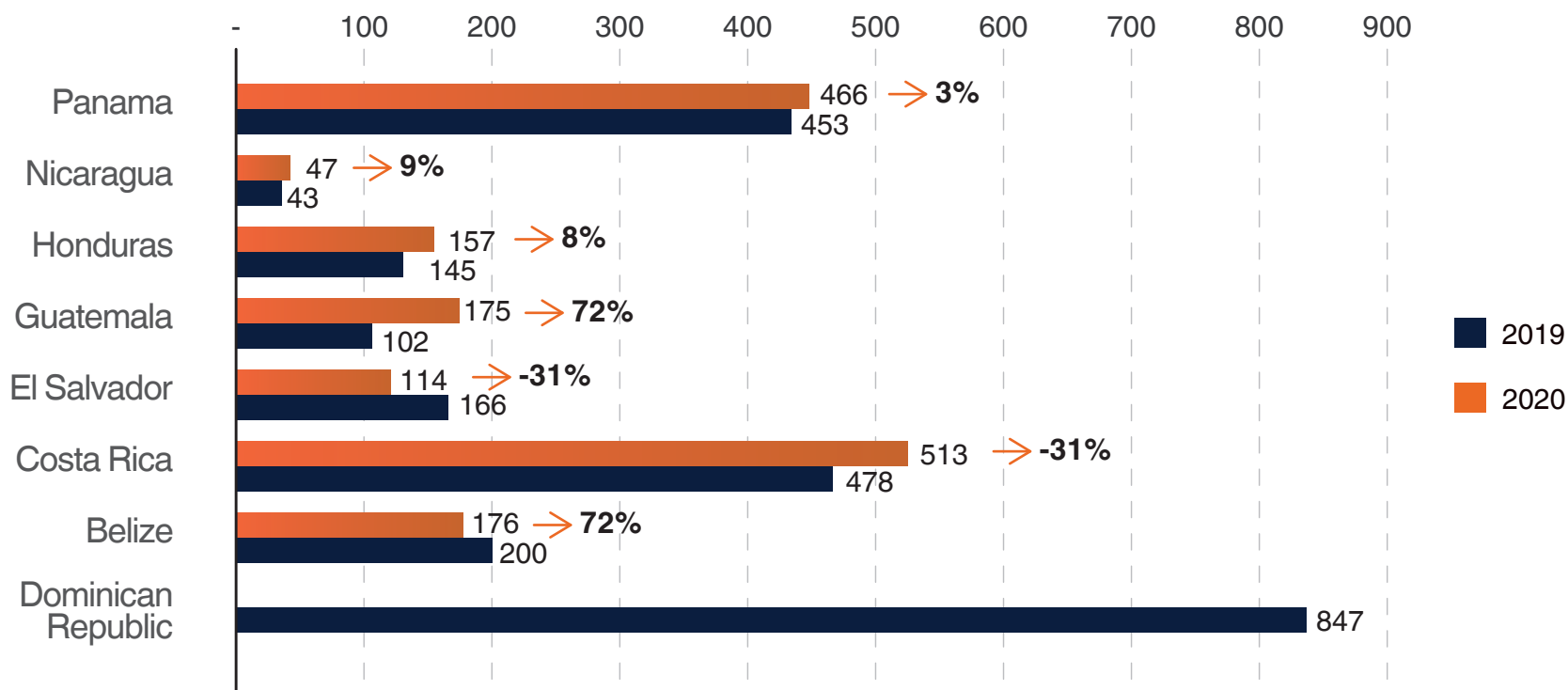


Note: Hotel occupancy data for Honduras are not available.

### ► 4.3.2. Travel Agencies



In 2020, the countries of the SICA region, excluding the Dominican Republic, registered a total of 1,648 travel agencies<sup>13</sup>. Five of the countries in 2020 for which data is available presented an increase in the number of travel agencies, while only El Salvador and Belize saw a reduction.



Note: No 2020 data available for the Dominican Republic.

<sup>13</sup>Excluding agencies in the Dominican Republic, for which data for 2020 was not available when preparing this document.



# **V. COMMERCIAL AND ECONOMIC DATA**

## ► 5.1. Revenues generated from tourism

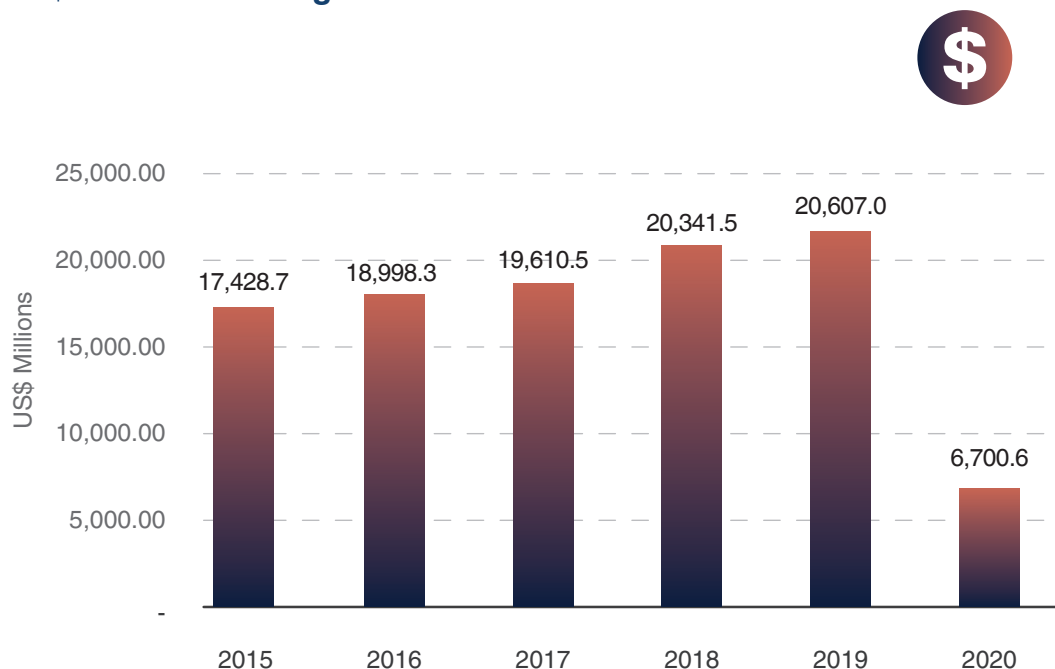
In 2020, as a result of the impact of the Covid-19 pandemic, the SICA region recorded a drop in tourism revenues of 67.5%, from US\$ 20.607 billion in 2019 to US\$ 6.700 billion in 2020. It is worth mentioning that the relative weight of each country in regional tourism revenues remained stable concerning its historical behavior. Contribution by country is described as follows in Table 5.1:

**Table 5.1: Individual country contribution to regional tourism revenues**

	2019	2020
Dominican Rep.	36.24%	39.90%
Belize	2.60%	2.26%
Costa Rica	19.41%	20.05%
El Salvador	8.55%	11.50%
Guatemala	6.06%	4.33%
Honduras	2.71%	2.33%
Nicaragua	2.50%	2.96%
Panama	21.93%	16.66%

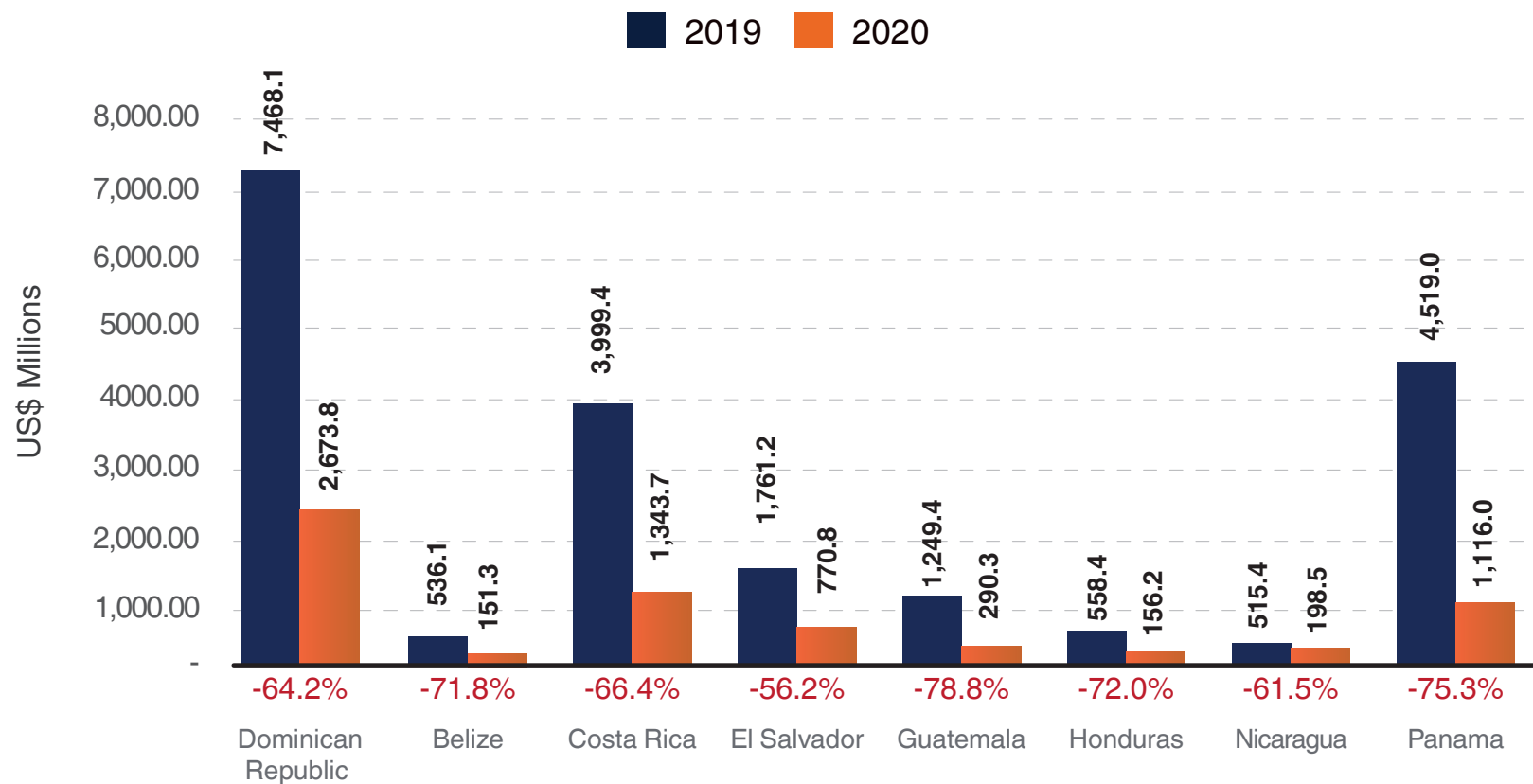
The drop in tourism revenues in 2020 broke with five years of continuous growth in this indicator, as shown in graph 5.23.1 below:

**Graph 5.23.1: Income generated by tourism in US\$ Million SICA Region 2015-2020**



Although the overall drop in regional income generated by tourism was 67.5%, and even though all countries in the SICA region registered a contraction in this variable in 2020, the intensity of this contraction was not the same in all countries. As shown in Graph 5.23.2, Guatemala, Panama, and Honduras suffered the most severe losses, with declines of 76.8%, 75.3% and 72%, respectively. In general, the ability of countries to cushion this drop in tourism revenues was linked to government provisions regarding the severity of quarantines and other preventive measures related to COVID-19.

**Graph 5.23.2: Tourism-generated revenues by country**  
**US\$ Millions and Inter-Annual Variation 2020-2019**

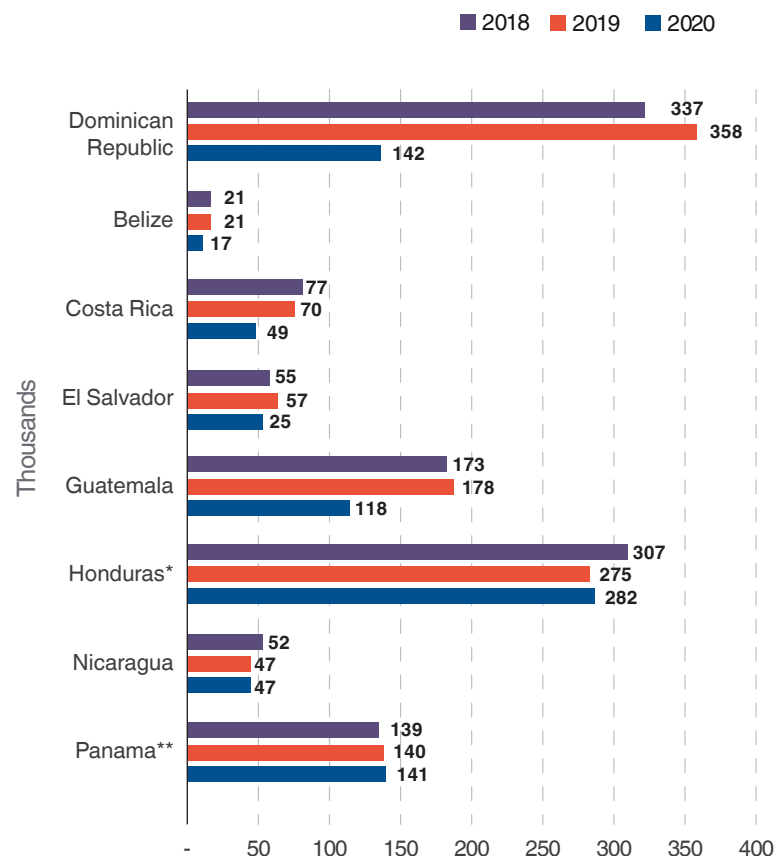


## ► 5.2. Direct and indirect jobs generated by tourism

In 2020, the regional tourism sector generated 847,900 formal jobs, which as a consequence of the Covid-19 pandemic, represents a contraction of 26% when compared to the 1.14 million registered at the close of 2019. At country level, five of the eight countries in the SICA region, namely the Dominican Republic, Belize, Costa Rica, El Salvador, and Guatemala, recorded contractions in terms of the number of jobs in the sector, while Honduras and Panama recorded a modest growth in this variable and Nicaragua saw no change.

In terms of percentage variation, the tourism employment indicator of among countries that registered a contraction, the most severe setback was in the Dominican Republic (60.3%), followed by Guatemala (33.7%) and Costa Rica (30.6%). In general, social distancing arrangements, the shock of local demand in the sector, and disruptions in the natural flow of air travel explain these contractions. A particular case is Nicaragua, a country that received the Covid-19 pandemic with an already weakened tourism sector due to the events of 2018, which led to a contraction of tourism in that year. However, Nicaragua's handling of the pandemic resulted in a stable level of formal employment in the tourism sector in 2020, which, in the Nicaraguan context, is no small feat and deserves to be applauded. Another notable case is El Salvador, which despite being the first country to declare quarantines in its territory, and the first country to close land borders in the SICA region, minimized the damage to its tourism sector, with a contraction of only 8.8% in formal employment, far from the levels cited earlier for the Dominican Republic, Guatemala or Costa Rica.

**Graph 5.24: Formal Employment in the Tourism Sector (in thousands) 2018 - 2020**



\* Honduras: Preliminary data \*Costa Rica presented changes in the series to report formal jobs only. In 2019, it gave numbers for formal and informal jobs. \*\*Panama and Honduras report the total sum of formal and informal employment.





## **VI. ANNEXES**

# CLOSING COMMENTS

The recapitulation of the tourism sector's performance in the SICA region during the year 2020 is conditioned by the Covid-19 pandemic in the region. As might be expected, it was also affected by the countries' responses to the health crisis. Although in 2019 the region had been showing signs of a gradual and modest process of compaction in the tourism sector's performance, the events of 2020 constitute a break in the normal development of tourism activity and undoubtedly mark a before and after in the regional reality.

In general terms, the sector's ability to rebound from this severe blow will be largely subject to the following elements:

1. First, the vaccination rate of the countries in the region and their capacity to cover the non-urban population.
2. Second, the provisions regarding travel, including, but not limited to, the costs of clinical tests to confirm the tourist is free of COVID-19, as well as migratory provisions referring to entry requirements for tourists.
3. Third, to the presence (or absence) of MSME support initiatives.
4. Fourth, the recovery of external demand in the main markets of origin of extra-regional tourists.
5. Fifth, the government's capacity to stimulate the real sector of the economy and normalize employment levels.
6. And sixth, to identify and stimulate strategic links in the tourism value chain for coordinated action hand in hand with other strategic sectors that drive and have a cross-cutting impact on the tourism sector in each country.

In sum, the events derived from the Covid-19 pandemic that affected tourism activity in 2020 constitute a before and after for the sector, both regionally and in international terms. However, although complex and challenging, the situation represents an opportunity for the tourism sector at both national and regional levels to strengthen its quality and competitiveness, supported by aspects such as innovation and the incorporation of technology. The exploration of new strategies for attracting visitors, as well as the consolidation of priority markets in North America and Europe, together with a comprehensive strategy to support the tourism sector, including lines of financing, strengthening of local tourism, and diversification of local offerings, are key elements for the sector to navigate the new regional reality.

# 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)	<a href="http://www.travelbelize.org">www.travelbelize.org</a> <a href="mailto:datarequests@belizetourismboard.org">datarequests@belizetourismboard.org</a> (501) 227-2420
Costa Rica	Instituto Costarricense de Turismo (ICT)	<a href="http://www.visitcostarica.com">www.visitcostarica.com</a> <a href="mailto:info@visitcostarica.com">info@visitcostarica.com</a> (506) 2299-5800
El Salvador	Ministerio de Turismo (MITUR)	<a href="http://www.mitur.gb.sv">www.mitur.gb.sv</a> (503) 2243-7835
Guatemala	Instituto Guatemalteco de Turismo (INGUAT)	<a href="http://www.visitguatemala.com">www.visitguatemala.com</a> <a href="mailto:info@inguat.gob.gt">info@inguat.gob.gt</a> (502) 2421 - 2800
Honduras	Instituto Hondureño de Turismo (IHT)	<a href="http://www.letsghonduras.com">www.letsghonduras.com</a> <a href="mailto:estadistica@iht.hn">estadistica@iht.hn</a> (504) 2222-2124
Nicaragua	Instituto Nicaragüense de Turismo (INTUR)	<a href="http://www.intur.gob.ni">www.intur.gob.ni</a> <a href="mailto:estadisticasit@intur.gob.ni">estadisticasit@intur.gob.ni</a> (505) 2254-5191
Panama	Autoridad de Turismo de Panamá (ATP)	<a href="http://www.atp.gob.pa">www.atp.gob.pa</a> <a href="mailto:mercadeo@atp.gob.pa">mercadeo@atp.gob.pa</a> (507) 526-7000
Dominican Republic	Ministerio de Turismo (MITUR)	<a href="http://mitur.gob.do/">http://mitur.gob.do/</a> <a href="mailto:sectur@sectur.gob.do">sectur@sectur.gob.do</a> (809) 221-4660

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Ocho países *Una sola Región*







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