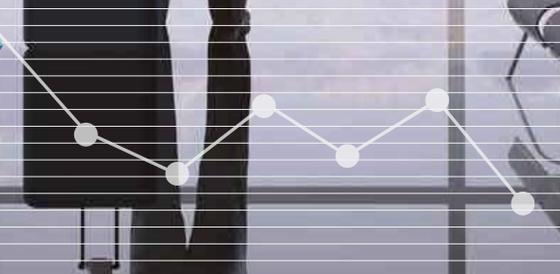




COMPENDIUM OF TOURISM STATISTICS 2018

OF THE SICA MEMBER COUNTRIES





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by The Secretariat for Central American
Tourism Integration (SITCA)

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Compendium of Tourism Statistics of the SICA Members countries 2018

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

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I. INTRODUCTION



Ilka Aguilar Valle
SITCA Executive Secretary

The Central American Tourism Council (CCT) through the Secretariat for Central American Tourism Integration (SITCA), recognizes the importance of tourism as an engine of socio-economic development and a potential generator of jobs in the region. Tourism activity has an inherent multiplier effect within local economies; a catalyst for commercial activity in rural and urban areas, involving the local population and providing employment alternatives compatible with traditional productive activities.

The present Compendium of Tourism Statistics 2018 from the SICA region is a summary of the sector's results obtained during the year 2018. This Compendium, is a document built on the information provided by the National Tourism Authorities (NTA) of the member countries of the SICA region: Belize, Guatemala, El Salvador, Honduras, Nicaragua, Costa Rica, Panama, and Dominican Republic. This instrument collects statistics from a regional context with the aim of sharing information on the behavior of tourism activity and providing inputs to support the planning and implementation of actions that encourage innovation, promotion, and sustainable tourism development.

The 2018 Compendium constitutes one of the main inputs for building timely and effective strategies that respond to the needs of the actors associated with tourism activity.

The Secretariat for Central American Tourism Integration (SITCA) makes available to the public this graphical, informational, and analytical tool, on various data and indicators of the tourism sector, which provides guidance on the behavior of tourism at the regional level.



II. GENERALITIES OF SITCA



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 in 1965 with its headquarters in the city of Managua, Nicaragua

► 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 Resolution VI that the CCT would have a permanent office to be called the Secreta-

riat 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 Resolution VI 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 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, 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

▶ 3.1 Tourist arrivals in the world¹

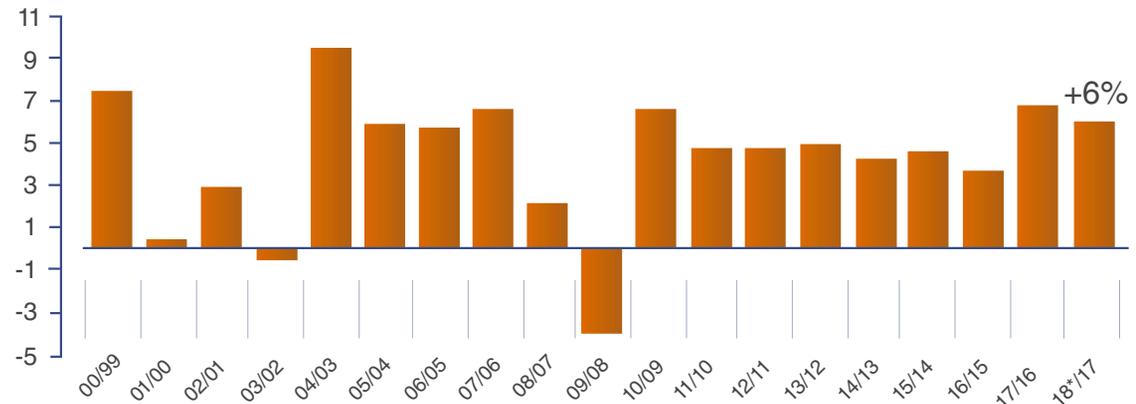
International tourist arrivals grew by 6% in 2018, totaling 1.4 billion according to the latest UNWTO World Tourism Barometer. UNWTO's long term forecast issued in 2010 indicated the 1.4 billion mark would be reached in 2020, yet the remarkable growth of international arrivals in recent years has brought it two years ahead.

In relative terms, the Middle East (+10%), Africa (+7%), Asia and the Pacific and Europe (both at +6%) led growth in 2018. Arrivals to the Americas were below the world average (+3%).

UNWTO's long-term forecast published in 2010 predicted the 1.4 billion mark of international tourist arrivals for 2020. Yet stronger economic growth, more affordable air travel, technological changes, new businesses models and greater visa facilitation around the world have accelerated growth in recent years.

2018: second best year since 2010

Graphic 3.1: International tourist arrivals, growth (%)



¹Information taken from the Barometer elaborated by the UNWTO, publication January 2019

► 3.2 Tourist arrivals per region

International tourist arrivals in Europe reached 713 million in 2018, a notable 6% increase over an exceptionally strong 2017. Growth was driven by Southern and Mediterranean Europe (+7%), Central and Eastern Europe (+6%) and Western Europe (+6%). Results in Northern Europe were flat due to the weakness of arrivals to the United Kingdom.

Asia and the Pacific (+6%) recorded 343 million international tourist arrivals in 2018. Arrivals in South-East Asia grew 7%, followed by North-East Asia (+6%) and South Asia (+5%). Oceania showed more moderate growth at +3%.

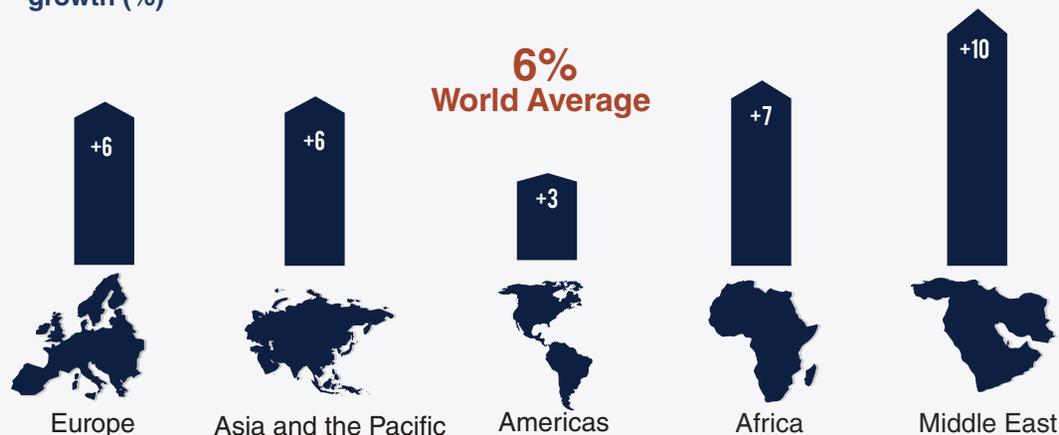
The Americas (+3%) welcomed 217 million international arrivals in 2018, with mixed results across destinations. Growth

was led by North America (+4%), and followed by South America (+3%), while Central America and the Caribbean (both -2%) reached very mixed results, the latter reflecting the impact of the September 2017 hurricanes Irma and Maria.

Data from Africa points to a 7% increase in 2018 (North Africa at +10% and Sub-Saharan +6%), reaching an estimated 67 million arrivals.

The Middle East (+10%) showed solid results last year consolidating its 2017 recovery, with international tourist arrivals reaching 64 million.

Graphic 3.2: Tourist arrivals per region growth (%)



Middle East,
Africa and Asia
Pacific
lead growth

▶ **3.3 Prospects for 2019**

Based on current trends, the economic outlook and the UNWTO confidence index, international arrivals are expected to increase by 3-4 percent next year, more in line with historical growth trends.

As a general background, stable fuel prices tend to translate into more affordable air travel, while air connectivity continues to improve in many destinations, facilitating diversification of source markets. Trends also show more travel from emerging markets, especially India and Russia, but also from smaller Arab and Asian source markets.

At the same time, the global economic slowdown, uncertainty related to Brexit, as well as geopolitical and trade tensions may lead to a "wait and see" attitude among investors and travelers.

Overall, 2019 is expected to see the consolidation among consumers of emerging trends such as the search for "travel to change and show", "the search for healthy choices" such as walking, wellness or sports tourism, "multi-generational travel" as a result of demographic changes and more responsible travel.

"Digitalization, new business models, more affordable travel and social changes are expected to continue to shape our industry, so both the destination and companies must adapt if they are to remain competitive," added Pololikashvili.

PROSPECTS 2019

+ Positive Factors

Stable price of oil = affordable air travel

better air connectivity

strong demand from emerging source markets

! Risks

economic slowdown

uncertainty about Brexit

geopolitical and commercial tensions

'see and wait' attitude in investors and travelers



IV. TOURISM IN SICA MEMBER COUNTRIES

▶ 4.1 Inbound tourism

The following definitions will be used in this document:

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) otherwise (IRTS 2008, 2.13).



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) otherwise (IRTS 2008, 2.13).



Excursionist

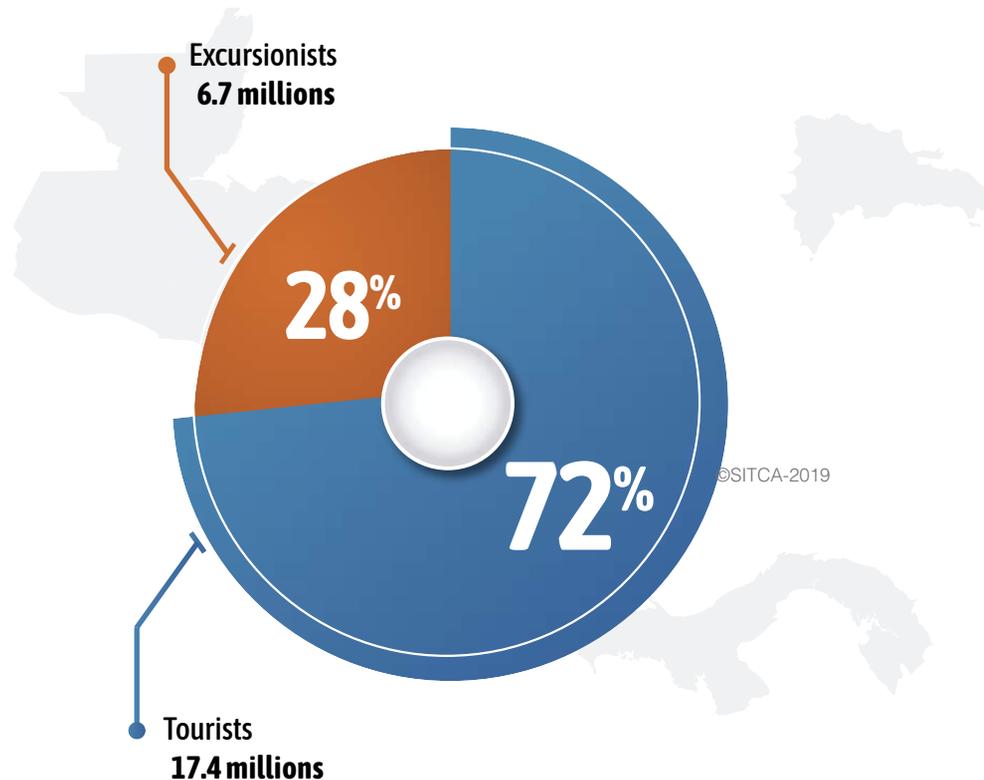
It refers to the visitor who does not spend the night at their destination, they are also known as same-day visitors.



● 4.1.1 Visitors, tourists, and excursionist' arrivals

The countries of the SICA², region have managed to maintain positive growth over the last five years. In 2018, 24.2 million visitors were received, with a rate of 4.6% compared to 2017.

Grap 1: Distribution of total visitors – SICA region



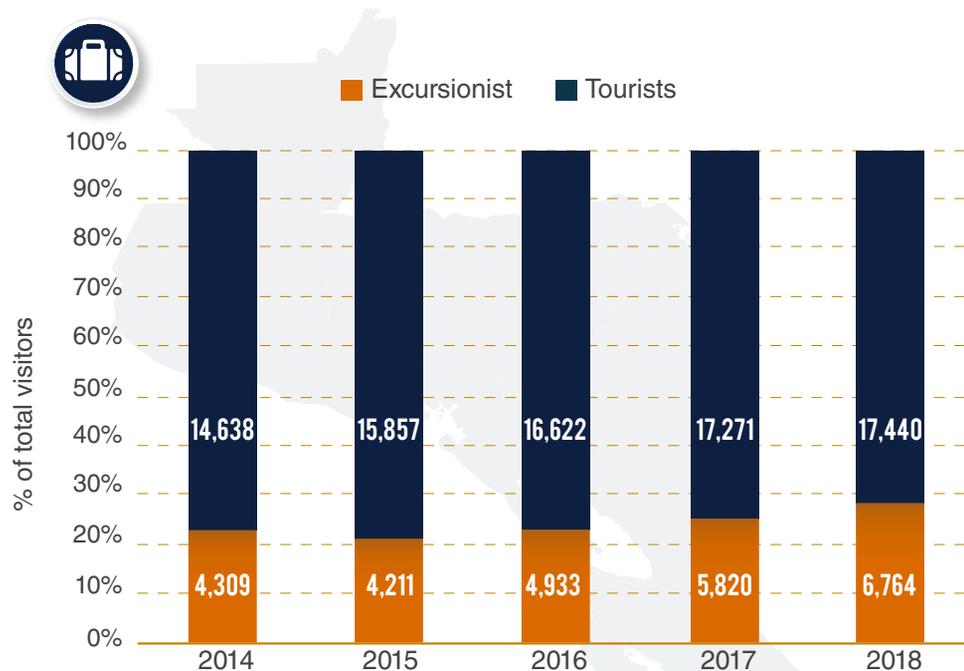
According to official figures provided by the National Tourism Authorities, of the 24.2 million visitors received, 72% (17.4 million) are tourists and 28% are excursionists (6.7 million).

Compared to 2017, the region grew by 1% in Tourist arrivals and 15.2% in excursionist arrivals, for a 4.6% growth in total visitor arrivals (Tourists + Same-day Visitors)

- The excursionists total does not include cruise ship passengers.

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

Graph 2: Percentage Visitor Structure per year



Excursionist: After a slight contraction reported in 2015 the growth trend of excursionists in recent years has been positive.

Tourists: The tourist segment has had a sustained growth in the last five years. Although a significant contraction was expected for 2018, the percentage of growth registered was 1%.

Only the Central American region (not including the Dominican Republic as a member of SICA) obtained a variation of -1.9% in tourist arrivals in 2018; however, in the overall total, the growth produced by the Dominican Republic (+11%) significantly balanced the regional result for 2018 in the SICA countries.

Graph 3: Interannual growth of visitors



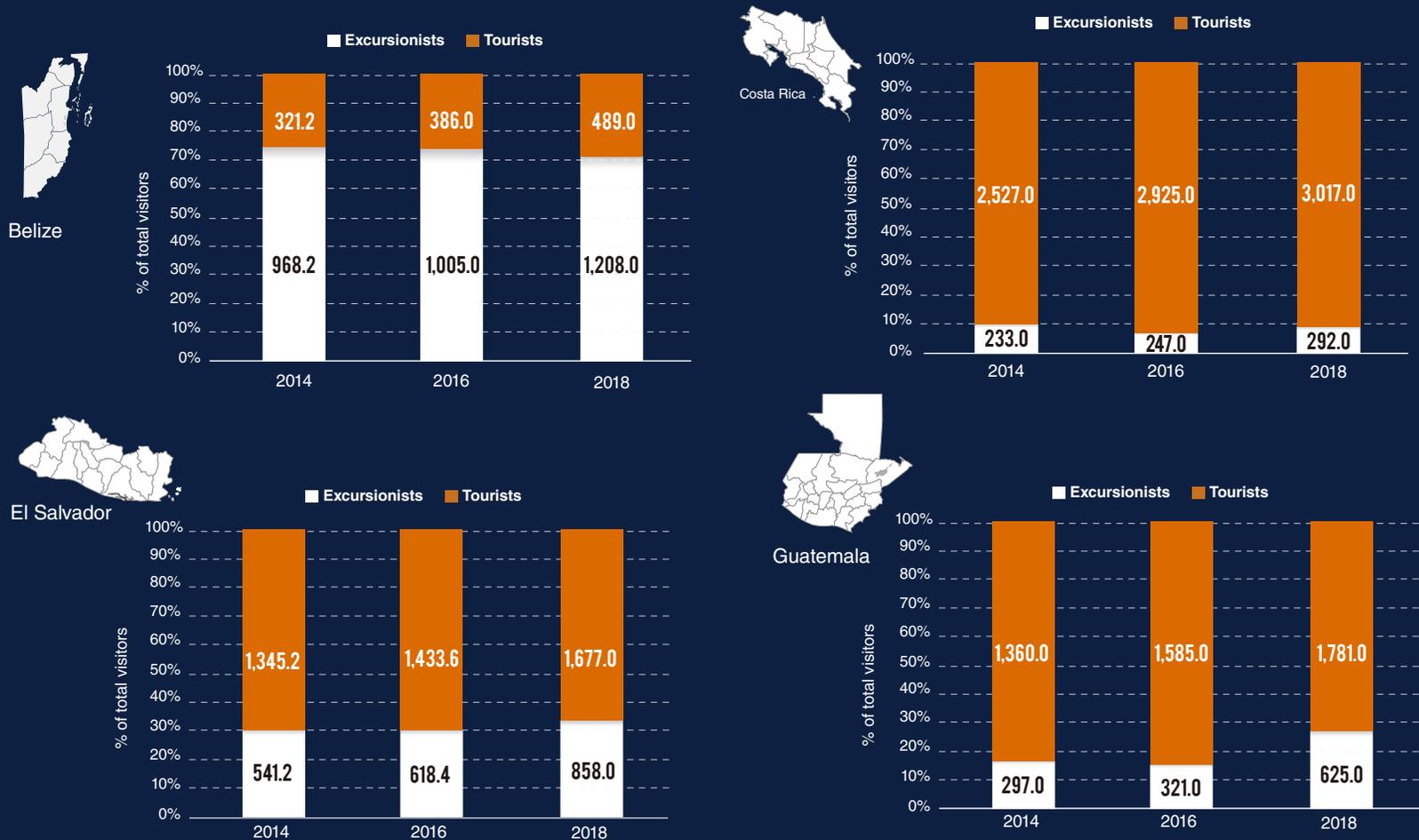
In 2018, the growth trend in total visitor arrivals suffered a contraction from the previous year; a result equivalent to the one obtained in 2015.

In 2015 the decrease was caused by the world financial crisis, the 9.5% growth reported in the previous year and the decrease in the arrival of excursionists.

Globally, the year 2018 was characterized by the emergence of various situations: migratory, geopolitical and commercial. In Latin America, these were generated at both the regional and sub-regional levels. The slight contraction in the year-on-year growth of total visitors was mainly influenced by the results obtained in tourist arrivals (+1%).

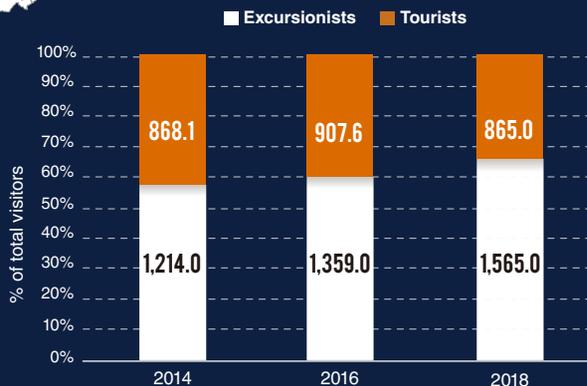
According to the categorization of visitors, in some countries with particular market conditions, the volume of excursionists may exceed the volume of tourists.

Graph 4: Visitor Structure by Country 2014-2018





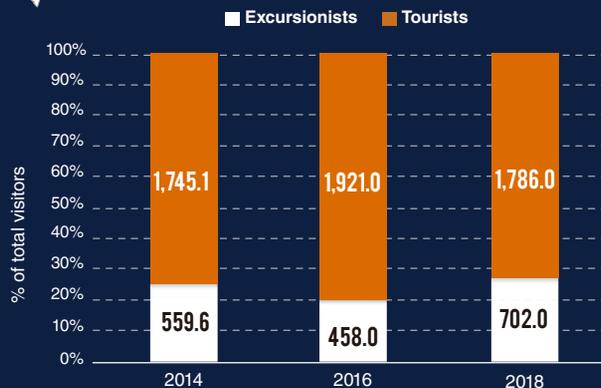
Honduras



Nicaragua



Panamá



Dominican Republic



This situation may be due to the characteristics of the national tourist offer, the geographical location near other important international tourism centers, characteristics of the receptive market or the local air or land interconnectivity that condition the time visitors stay, and affects their behavior when making a trip.

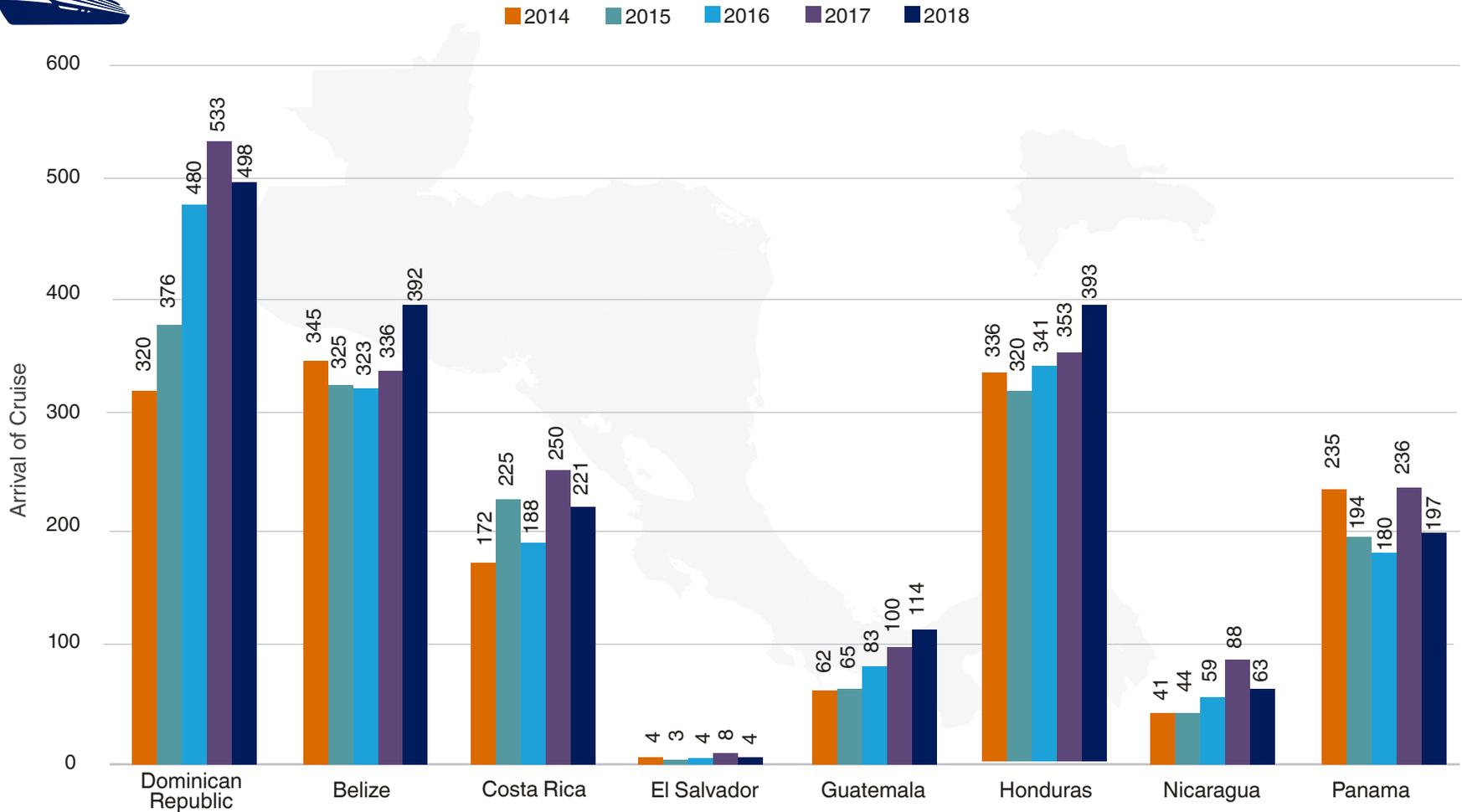
● 4.1.2 Arrival of Cruise and Cruise passengers

During 2018, the Central American Integration System (SICA), made up of the countries of Central America and the Dominican Republic, received a total of 1,882 Cruises, -1% compared to 2017.

This activity resulted in the arrival of 4.7 million cruisers, a figure that generated a positive growth of 5% in the arrival of this segment in 2018.

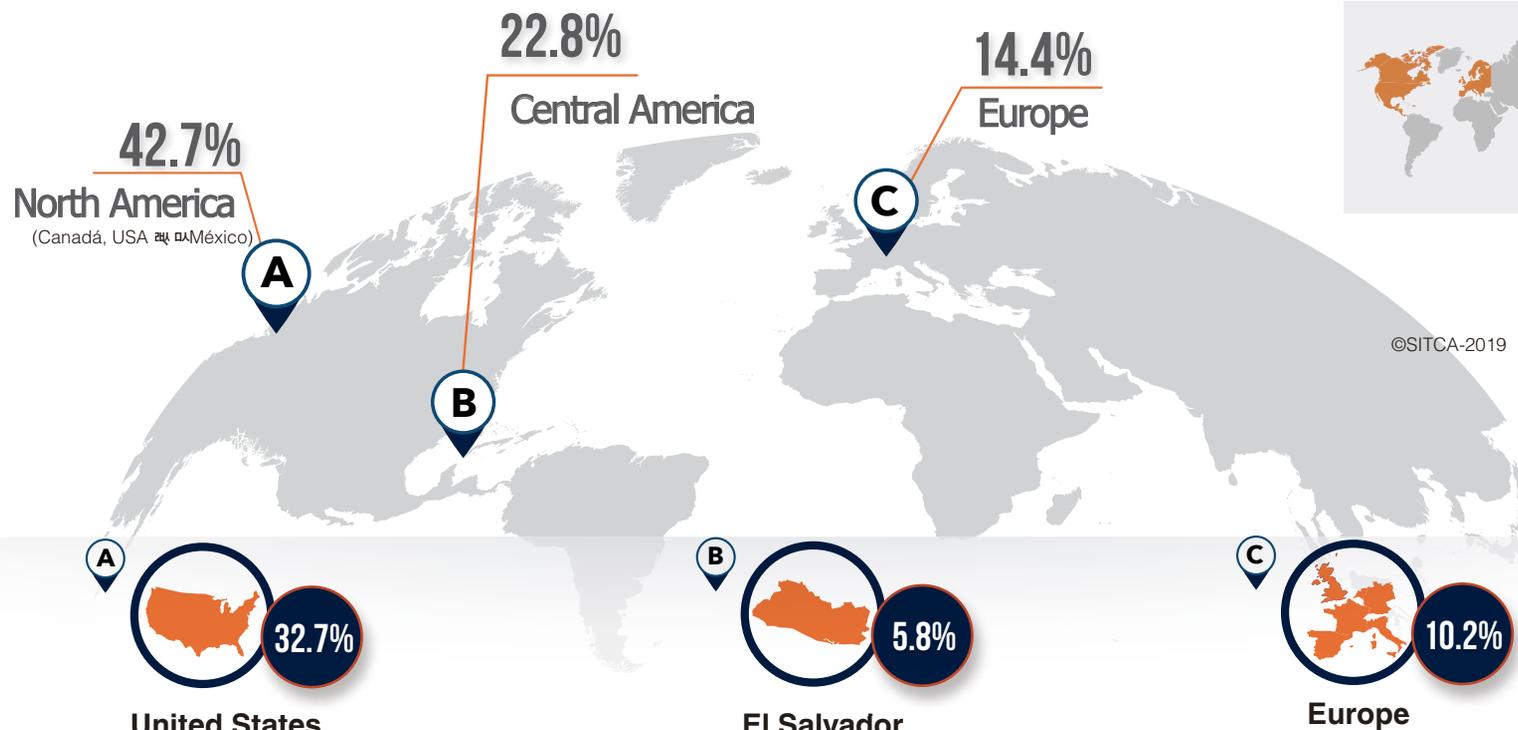


Figure 5: Cruises received in the region during the period 2014-2018



● 4.1.3 Tourist arrivals by geographical region and country of origin

In 2018, the SICA region received 17.44 million tourists . North America, Central America and Europe continue to be the three regions from which the largest number of tourists come to Central America and the Dominican Republic. The participation percentages are as follows:



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Of the North American market, the country with the highest participation is the United States, which represents 32.7%, establishing itself as the highest perceived during the year 2018.

El Salvador is the country with the highest participation in the intra-regional market 5.8%, followed by Guatemala 4.8% and Honduras 4.6%.

During 2018, the countries prioritized by CATA⁴ which are: Germany, Spain, France, Holland, Italy, United Kingdom represented a 10.2% of the total European market received

³ The Dominican Republic is in the Caribbean group given the geographical region parameter. This analysis segment does not include data from Honduras.

⁴ Central American Tourism Agency (CATA) of the Central American Council of Tourism (CCT)

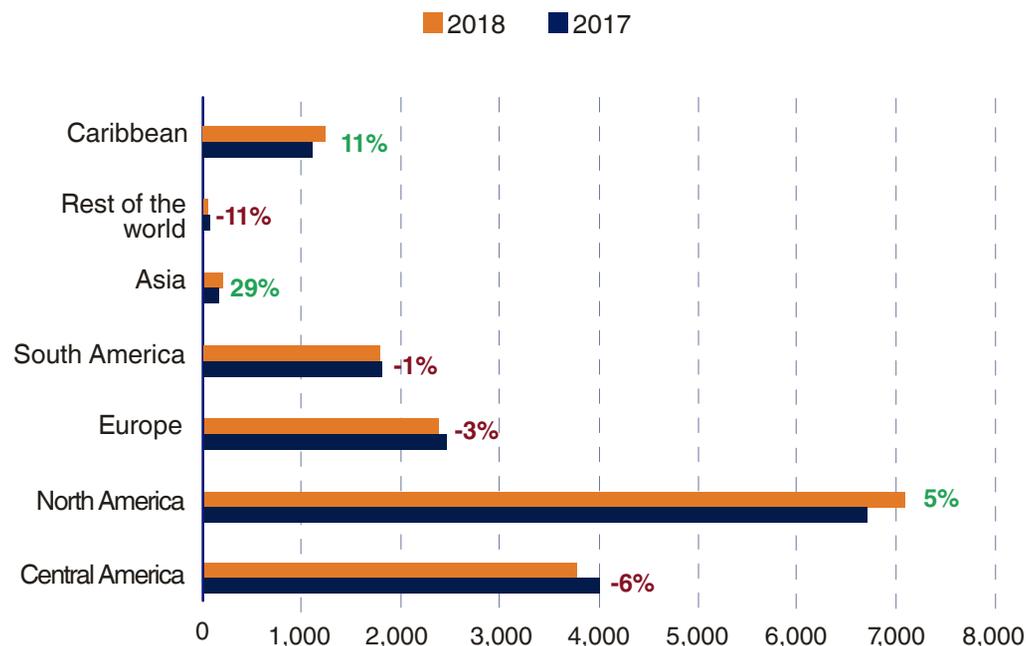
Figure 6: Tourist Arrivals according to region of origin, expressed in thousands of people, variation 2017-2018⁵

Tourist arrivals to the region during 2018, generated a growth of 1% over the previous year. However, if only the Central American countries are analyzed (not including the Dominican Republic as a member of SICA) a contraction of -1.9% is obtained. This overall result is influenced by a clear decrease in two of the three main markets, namely; the intraregional (-6%) and the European (-3%).

On the other hand, tourists from Asia continue to climb. During 2018, it was constituted as the region with the highest growth, showing an increase of 29%, 3.6 times more than what was achieved in 2017.

Equally, the Caribbean region showed a significant growth of 11%.

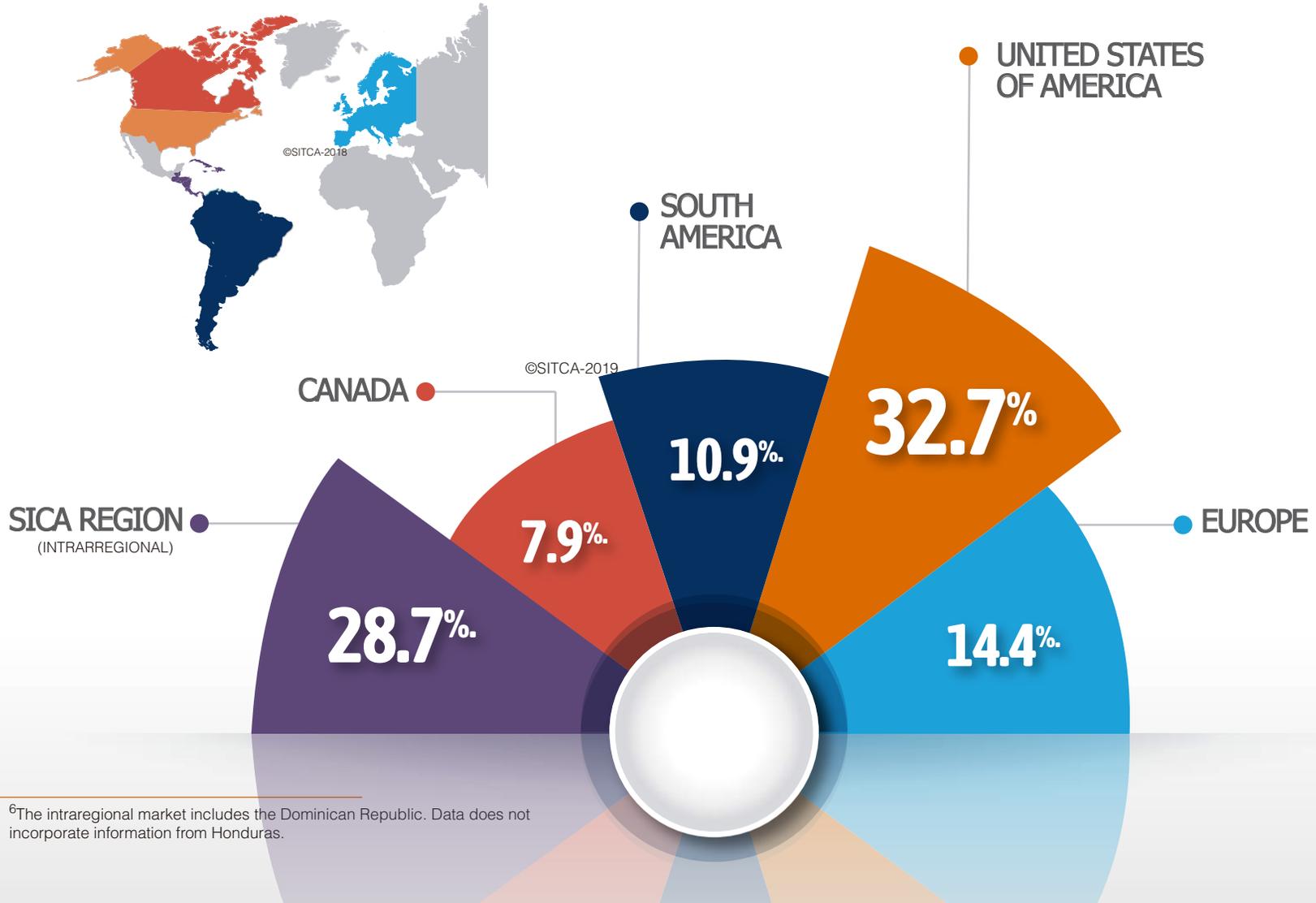
As a significant data, the North American region conformed by: Canada, USA and Mexico, continues showing a sustained growth and dynamism. During 2018, it presented a significant increase of 5%.



	Central America	North America	Europe	South America	Asia	Rest of the world	Caribbean
% Growth	-6%	5%	-3%	-1%	29%	-11%	11%
2018	3,769	7,071	2,389	1,806	208	60	1,242
2017	3,992	6,709	2,457	1,826	161	67	1,116

⁵Data from Honduras are not included for both periods.

Graph 7: Main Markets- SICA Region 2018 ⁶



⁶The intraregional market includes the Dominican Republic. Data does not incorporate information from Honduras.

Tabla 1 : Ranking of tourists by country of origin - Percentage of participation of the total received ⁷

Ranking	Country	Ranking	Absolute Figure	Participation
	#01	United States	5,411,690	32.7%
	#02	Canada	1300,209	7.9%
	#03	Dominican Republic	978,465	5.9%
	#04	El Salvador	964,191	5.8%
	#05	Guatemala	799,507	4.8%
	#06	Honduras	758,356	4.6%
	#07	Nicaragua	563,463	3.4%
	#08	Costa Rica	470,895	2.8%
	#09	Colombia	437,942	2.6%
	#10	France	374,235	2.3%
	#11	Germany	371,805	2.2%
	#12	Mexico	359,094	2.2%
	#13	Argentina	358,760	2.2%
	#14	Spain	349,836	2.1%
	#15	United Kingdom	319,928	1.9%
	#16	Brazil	254,845	1.5%
	#17	Venezuela	247,059	1.5%
	#18	Russia	233,653	1.4%
	#19	Panama	187,871	1.1%
	#20	Chile	166,792	1.0%
	#21	Italy	159,184	1.0%
	#24	Netherlands	108,222	0.7%

■ Intra-regional Market ■ European market prioritized by CATA⁸

- Intra-regional Tourism, despite the perceived contraction of -6% in 2018, remains one of the vital markets within the dynamics of the regional tourism sector. In 2018, seven of the eight member countries of the Central American Integration System (SICA) are in the top 10. This market contributed more than 4.7 million tourists which represented 28.7% of the total received, being the second with the highest value, only surpassed by the United States with 31.3%.

- Four of the six European countries prioritized by CATA are in the top 20. Italy and the Netherlands are in the 21st and 24th rankings, respectively.

Russia ranked 18th (233,653 thousand tourists), Switzerland ranked 26th (86,407) and Belgium ranked 28th (60,286). These remain the most representative non-traditional emerging markets within the European market.

⁷Does not include data provided by Honduras (865,000 tourists received)
⁸Central American Tourism Agency (CATA) of the Central American Tourism Council (CCT)

Ranking of tourists received from the six target markets prioritized by CATA - Percentage of participation in the total received in 2018.

The six countries prioritized within the European market by the Central American Tourism Council through the Central American Tourism Promotion Agency (CATA) are; Germany, Spain, France, Holland, Italy, and the United Kingdom. In 2018, 1,683,210 tourists arrived in the region, equivalent to 10.2% of the total received in the region.

Tourists in this segment are mainly directed to the Dominican Republic (886 thousand), Costa Rica (353 thousand) and Panama (212 thousand).

Tabla 2: Ranking of total tourists received from the six priority European markets - 2018

	Rank	Country Ranking	Total
Tourists from the six prioritized countries of the European market 1,683,210	#01	France	374,235
	#02	Germany	371,805
	#03	Spain	349,836
	#04	United	319,928
	#05	Italy	159,184
	#06	Netherlands	108,222

Graph 8: Percentage of participation of the six prioritized countries in the European market, over the total number of tourists received in the region.

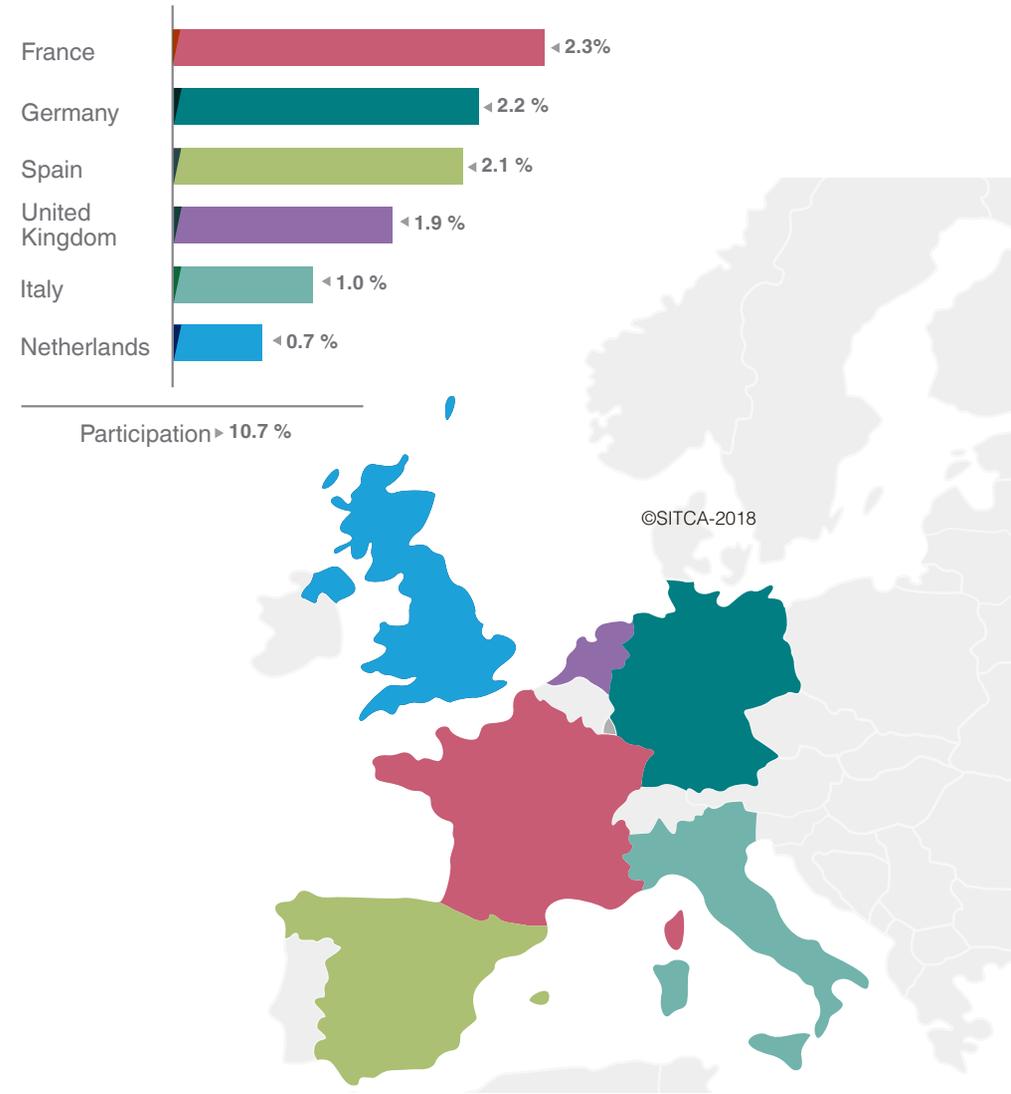
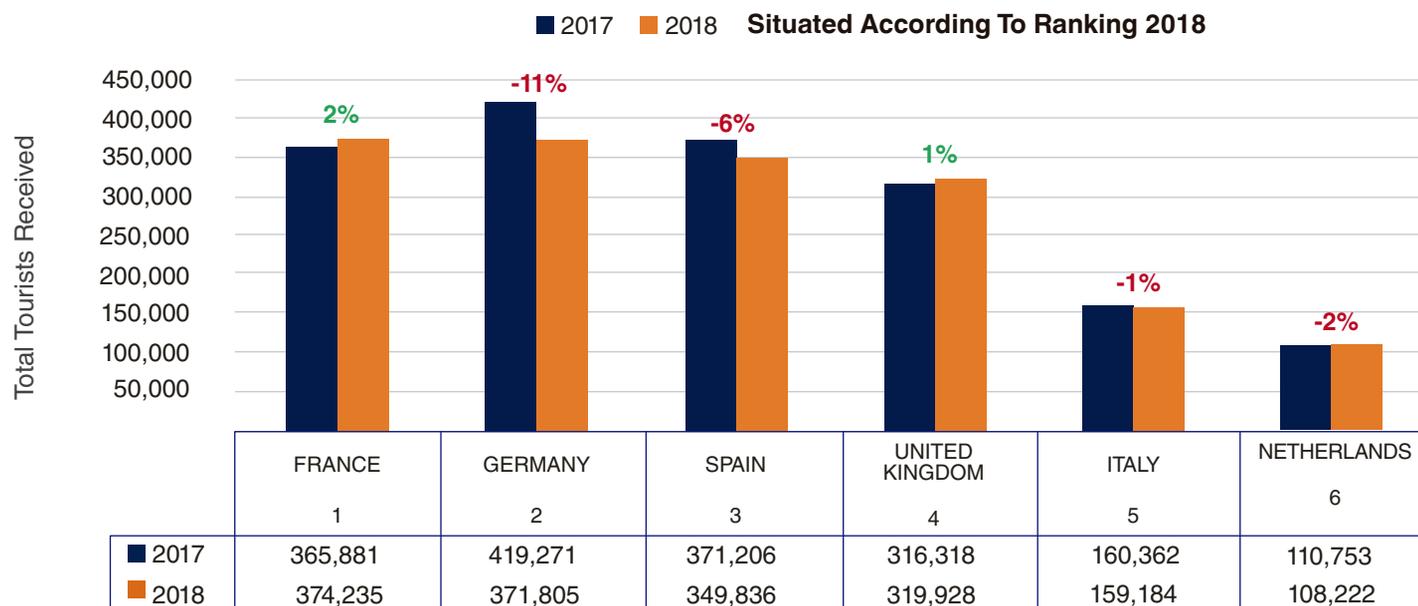


Gráfico 9: Graph 9: Arrival of tourists from the six priority target countries within the European market, variation 2017-2018



In 2018, the six target countries within the European market registered an overall contraction of -3% compared to the previous year. Germany (-11%), Spain (-6%) and the Netherlands (-2%) showed the most significant decreases.

In contrast, France (+2%) and the United Kingdom (+1%) were the two countries that recorded growth during 2018.

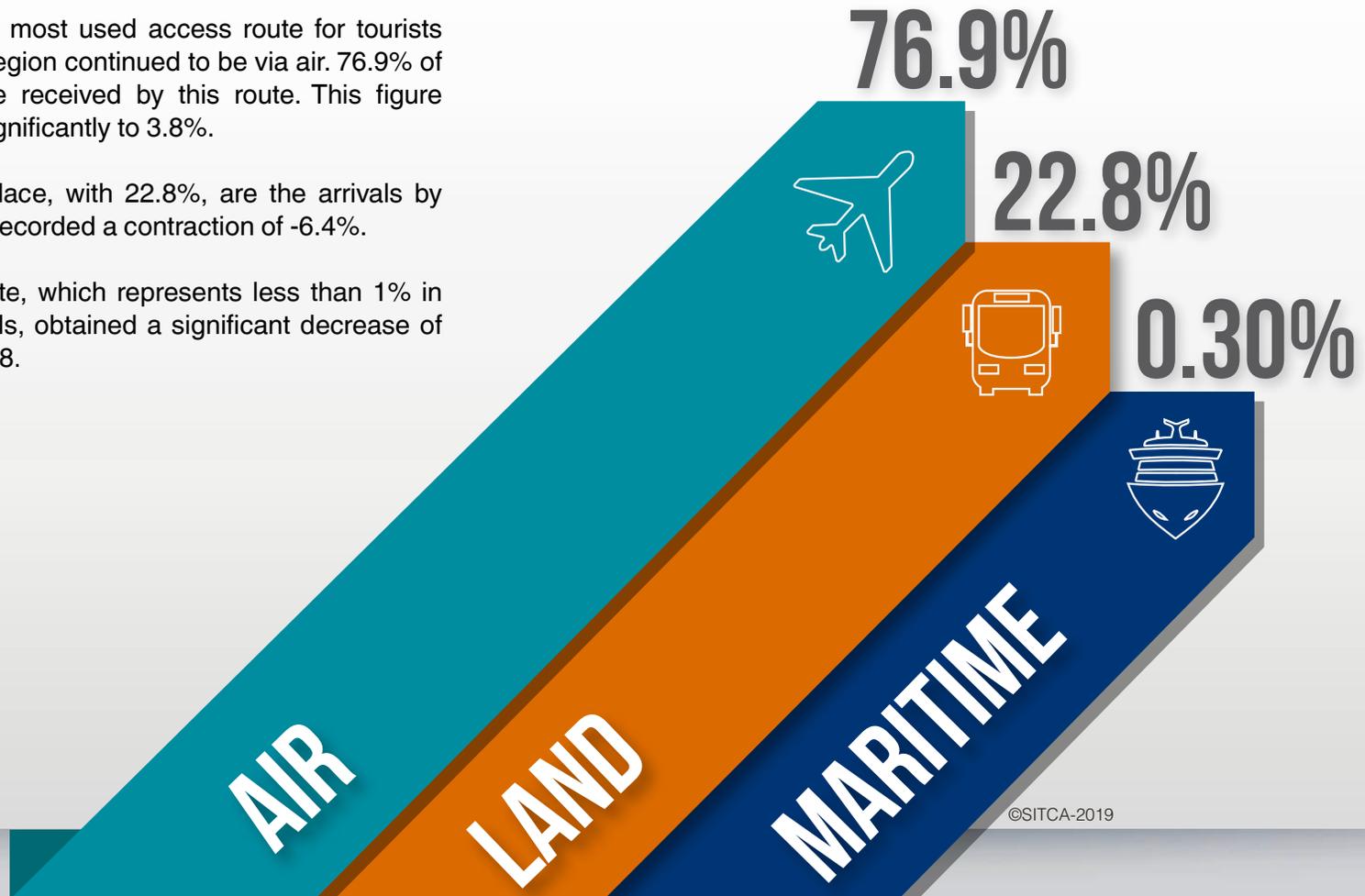
The results in this segment of analysis correspond to a general decrease in tourist arrivals in the SICA region.

● 4.1.4 Tourist arrivals by route of entry

In 2018, the most used access route for tourists visiting the region continued to be via air. 76.9% of arrivals were received by this route. This figure increased significantly to 3.8%.

In second place, with 22.8%, are the arrivals by land, which recorded a contraction of -6.4%.

The sea route, which represents less than 1% in tourist arrivals, obtained a significant decrease of -8.6% in 2018.



Graph 10: Country participation in tourist arrivals by entry route

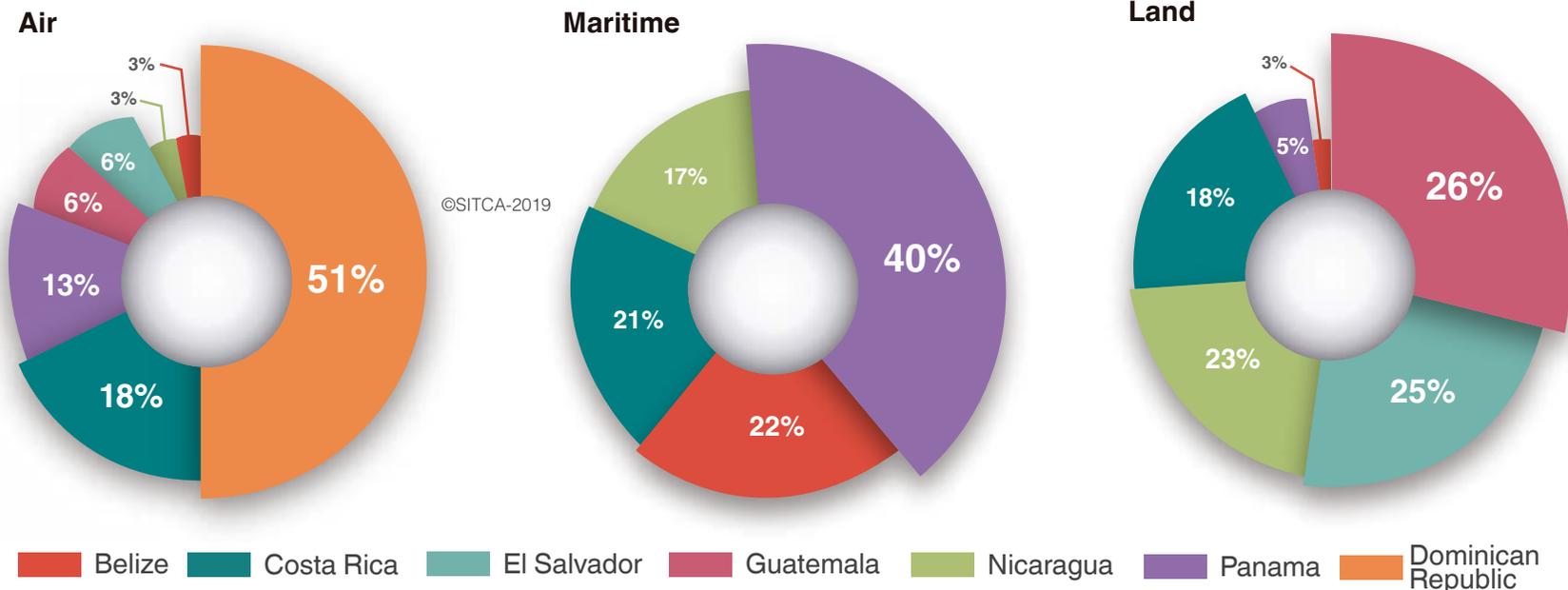
In 2018, the Dominican Republic continued to position itself as the country in the region with the highest participation in tourist arrivals by air. Just over half of the total number of tourists received in the region by air traveled to the Caribbean country. Costa Rica, with 18%, and Panama, with 13% of participation are in second place.

Panama is once again positioned as the country of reference in the arrival of tourists by sea; 17 thousand tourists entered

the country by this modality. Belize (22%) is in second place, followed by Costa Rica (21%) and Nicaragua (17%).

Regarding inland arrivals, Guatemala (26%), El Salvador (25%), Nicaragua (23%) and Costa Rica with 18% are the countries with the highest participation.

Costa Rica is the only country with outstanding participation in the three categories.



● 4.1.5 Travel Motivation for inbound tourism trips

According to surveys carried out by the National Tourism Authorities (NTA), in 2018 the main travel motivation of tourists visiting the SICA Region are vacation, leisure and recreation with 66%, followed by visits to friends and family (18%) and finally Business and professional motives 8%.

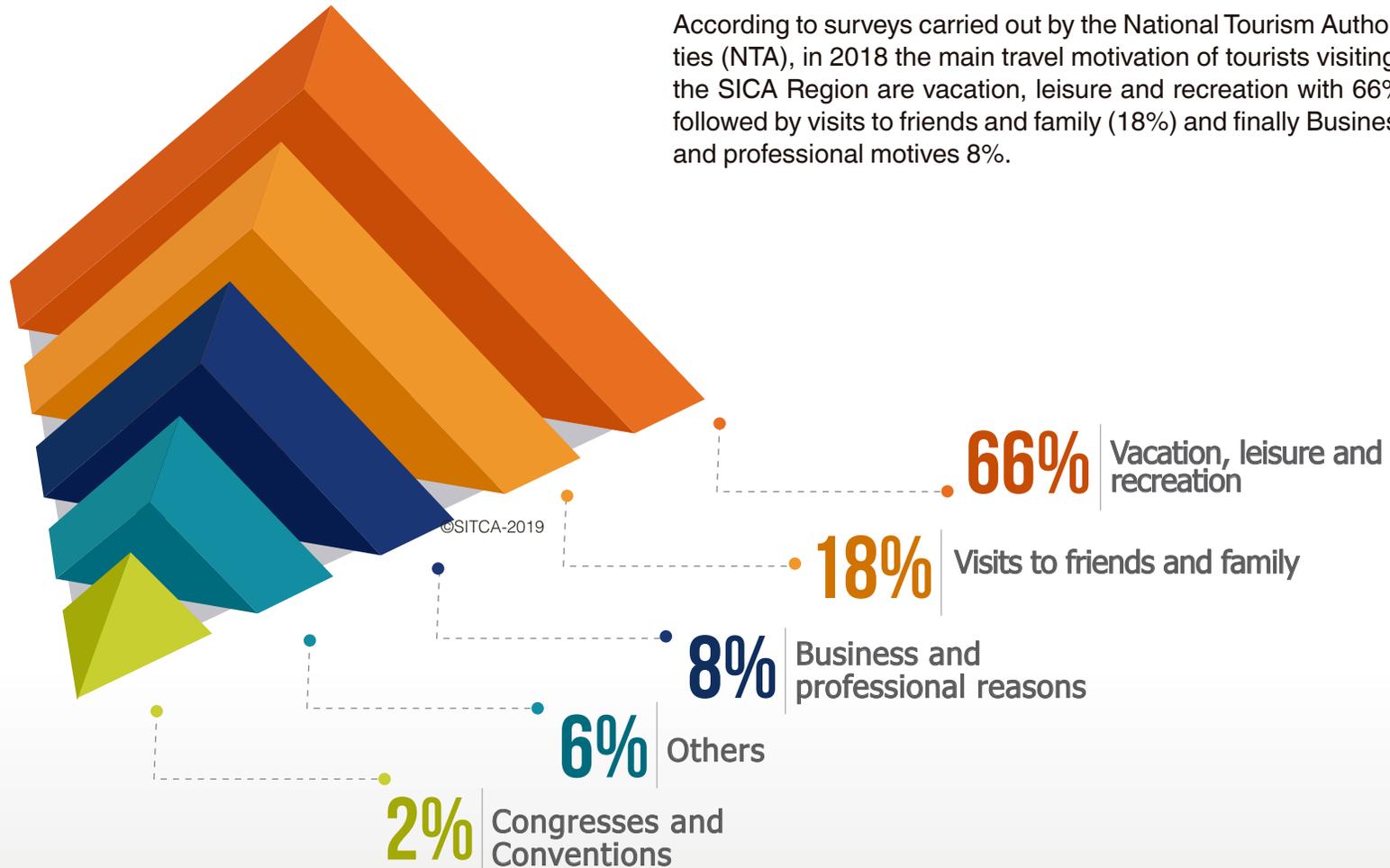


Table 3: Travel Motivation for travel by inbound tourism
Percentage distribution by country, year 2017 and 2018⁹

Year	Reason	Belize	Costa Rica	El Salvador	Guatemala	Nicaragua	Panama	Dominican Republic
2017	Congresses and conventions	0%	1%	2%	1%	1%	6%	0%
	Business and professional motives	4%	9%	7%	13%	21%	7%	2%
	Vacation, leisure and recreation	82%	77%	44%	49%	42%	70%	95%
	Visiting friends and family	14%	10%	46%	26%	29%	0%	2%
	Other	0%	3%	1%	11%	8%	17%	1%
2018	Congresses and conventions	0%	1%	2%	2%	1%	6%	0%
	Business and professional motives	2%	10%	7%	14%	16%	7%	1%
	Vacation, leisure and recreation	96%	74%	40%	53%	38%	70%	92%
	Visiting friends and family	2%	10%	50%	20%	39%	0%	6%
	Other	0%	5%	1%	10%	6%	17%	1%

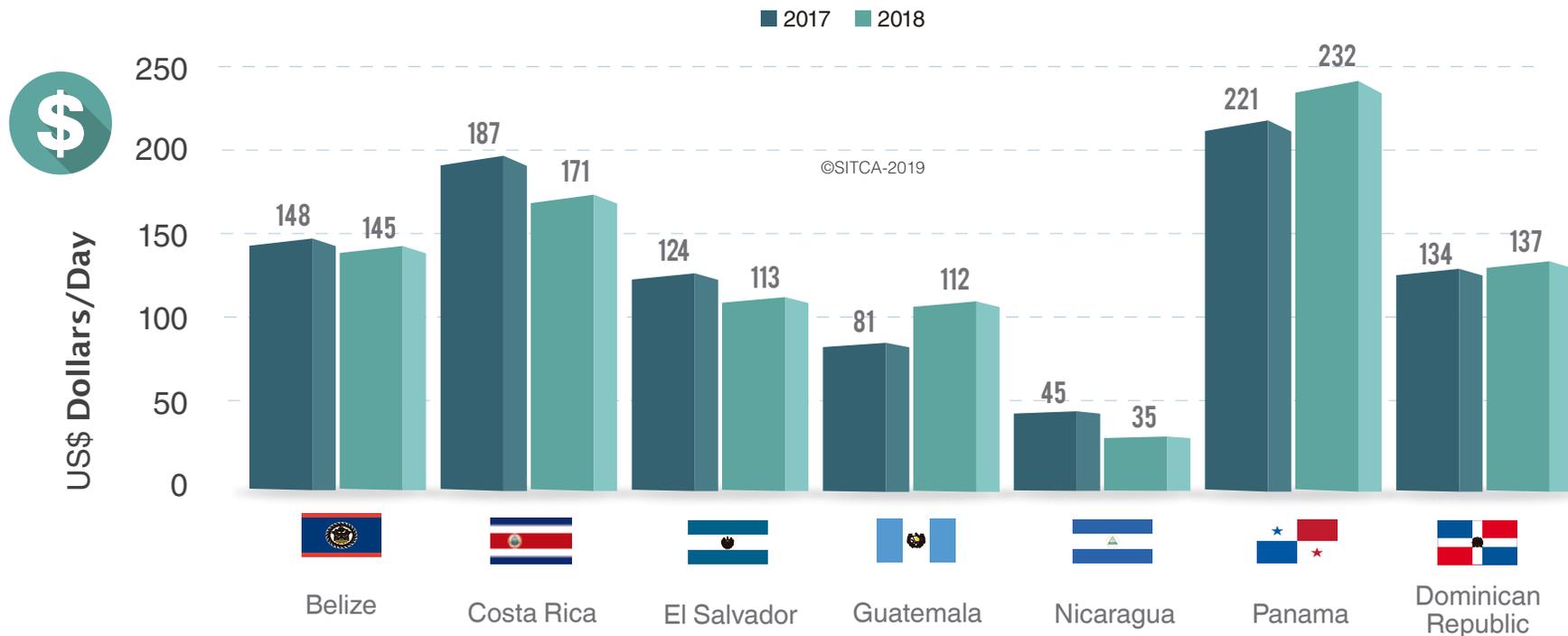
- Although visits to family and friends is the second reason for travel reported at the regional level, for El Salvador and recently Nicaragua it is the main reason for tourists arriving in the aforementioned countries.
- Despite the contraction of 5 points in percentage compared to 2017, Nicaragua continues to position itself as the territory with the highest percentage of the total arrivals under the segment “Business and professional motives”. In 2018, 16% of the tourists who visited Nicaragua did it for this reason. The second country with the highest percentage in this segment is Guatemala with 14%, followed by Costa Rica with 10%.
- Regarding the "Congresses and conventions" motive, Panama is the regional benchmark with 6%.

⁹ Note: In green the main reason is indicated.
 No data from Honduras included.

4.1.6 Average daily expenditure¹⁰

The average daily expenditure in 2017 (including Costa Rica) was US\$ 134. In 2018, despite the contraction in four of the seven countries studied, the regional average was US\$ 135. This positive result is due to a representative increase in Guatemala, which in 2018 presented an important growth of 39% in the average daily expenditure of tourists. Panama and the Dominican Republic presented increases of 5% and 2%, respectively.

**Graph 11: Touristic expenditure
2017 - 2018
US\$ Dollars/Day**



¹⁰ Expense does not include ticket
For 2017 and 2018 no data from Honduras is incorporated

● 4.1.7 Average nightly stay

In 2018 the regional average stay was 8 nights, one night more than 2017. Nicaragua and Costa Rica average the highest time (12 nights), followed by the Dominican Republic, Panama and El Salvador with (8 nights) respectively.

It is important to note that the averages of each country exceed 6 nights, regionally. This, depends mainly on the characteristics of the country's offer and the work around: diversification of products, establishment of competitive prices, characteristics of its main markets, multilevel organization, promotion and local diffusion, among others.

Graph 12: Average nightly stay
Average country nights- 2018



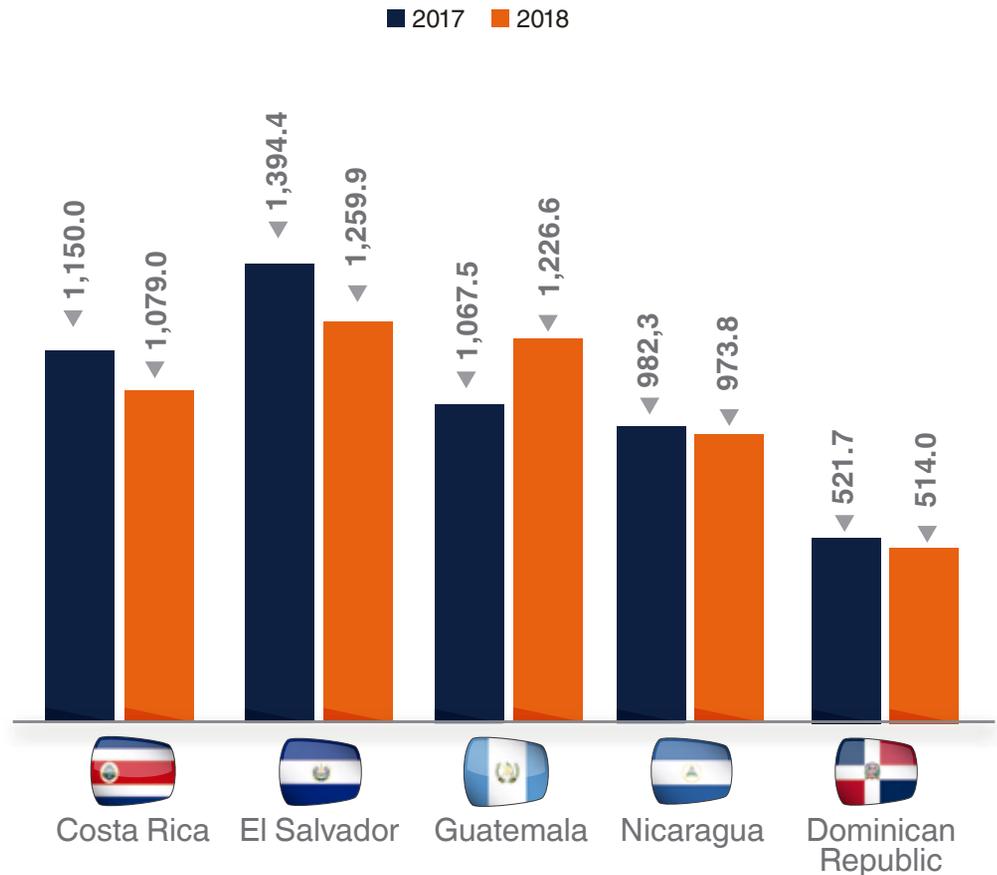
▶ 4.2 Outbound tourism

● 4.2.1 Tourist departures

According to the latest figures published in 2017, the number of tourists who left the region for tourism purposes was 5.11 million. By 2018 this figure decreased by - 1%.

The number of Central Americans and Dominicans that went out of their countries to do tourism was 5.05 million.

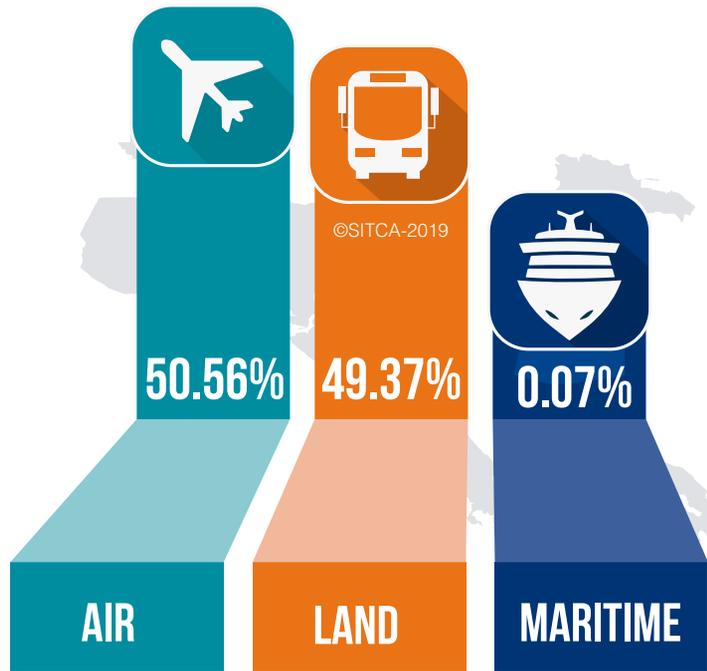
Graph 13: Tourist Departures 2018 - Figures in thousands ¹²



¹² Data from Belize, Panama, and Honduras are not included
 El Salvador: Survey of Visitor Counts CORSATUR-SPSS SA DE CV

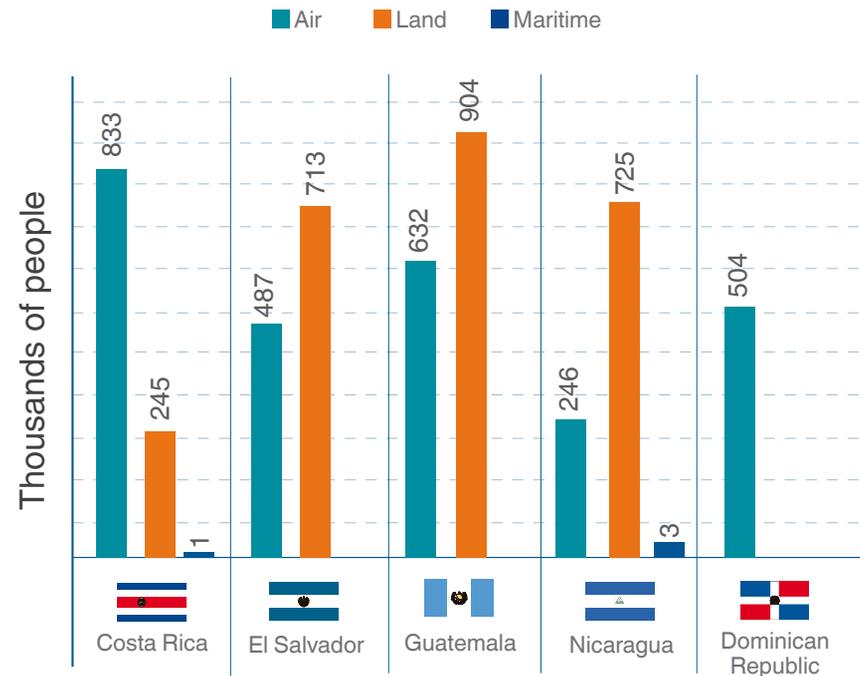
● **4.2.2 Departure routes of outbound tourism¹³**

The most used mode of transport by tourists from SICA member countries is air with 50.46% of the total, followed closely by land with 49.37%. The sea route was used by only 0.07%.



In 2018, a total of 2.7 million citizens of SICA member countries, and who were engaged in tourism, opted air travel as a departure option, 2.6 million used land travel. For the first time in many years, the land route is not the most widely used in the region. However, it should be noted that the data was only obtained from 5 out of the 8 countries. For the Dominican Republic and Costa Rica, the most used departure route by nationals is air. In Guatemala, El Salvador and Nicaragua the land route is the most used.

Graph 14: Tourist departures by different routes - 2018



¹³ No data from Belize, Honduras, and Panama are recorded.

● 4.2.3 Travel Motivations for outbound tourism travel



**Congresses and
conventions**

7%

Others

7%

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**Business and
professional motives**

23%



**Vacation, leisure
and recreation**

46%



**Visiting friends
and family**

50%

The main reason for the outbound tourist to travel is "Visit friends and family" with 50%, followed by "Vacation, leisure and recreation" with 46%. "Business and professional motives" with 23% of the total is in third place.

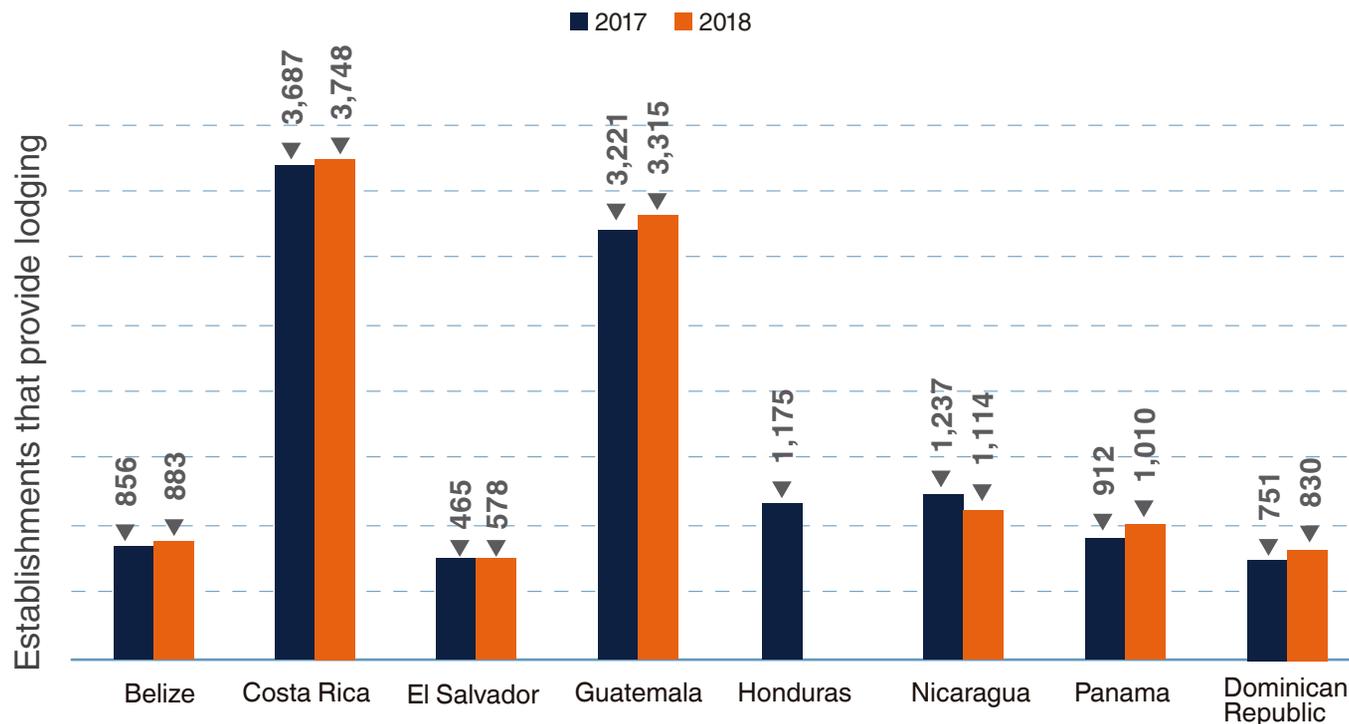
► 4.3 Touristic offer

● 4.3.1 Accommodation

– 4.3.1.1 Number of Establishments

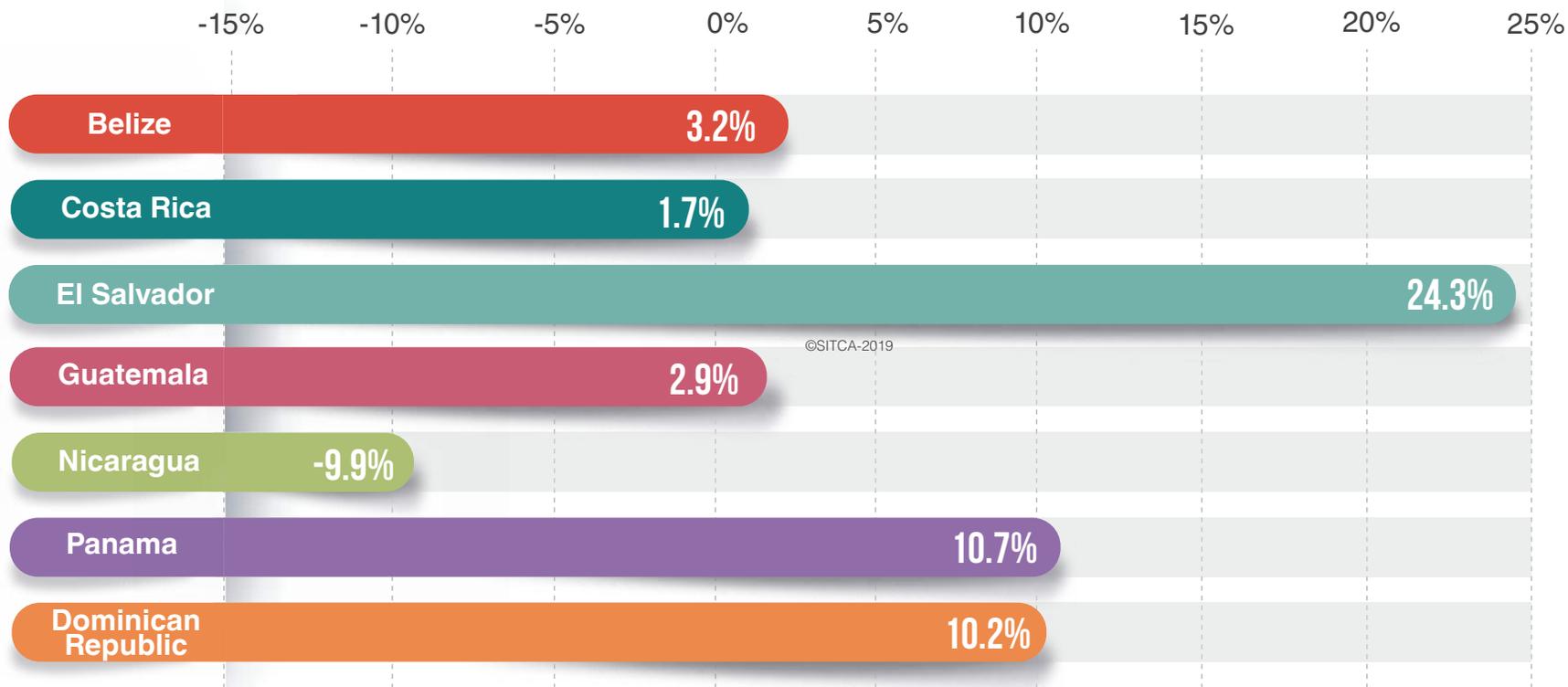
At the end of 2018, the National Tourism Authorities of the SICA member countries reported 11,478 establishments that provided lodging ¹⁴.

Graph 15: Number of establishments that provide lodging at the regional level 2017-2018



¹⁴ For 2018, data for Honduras is not included.

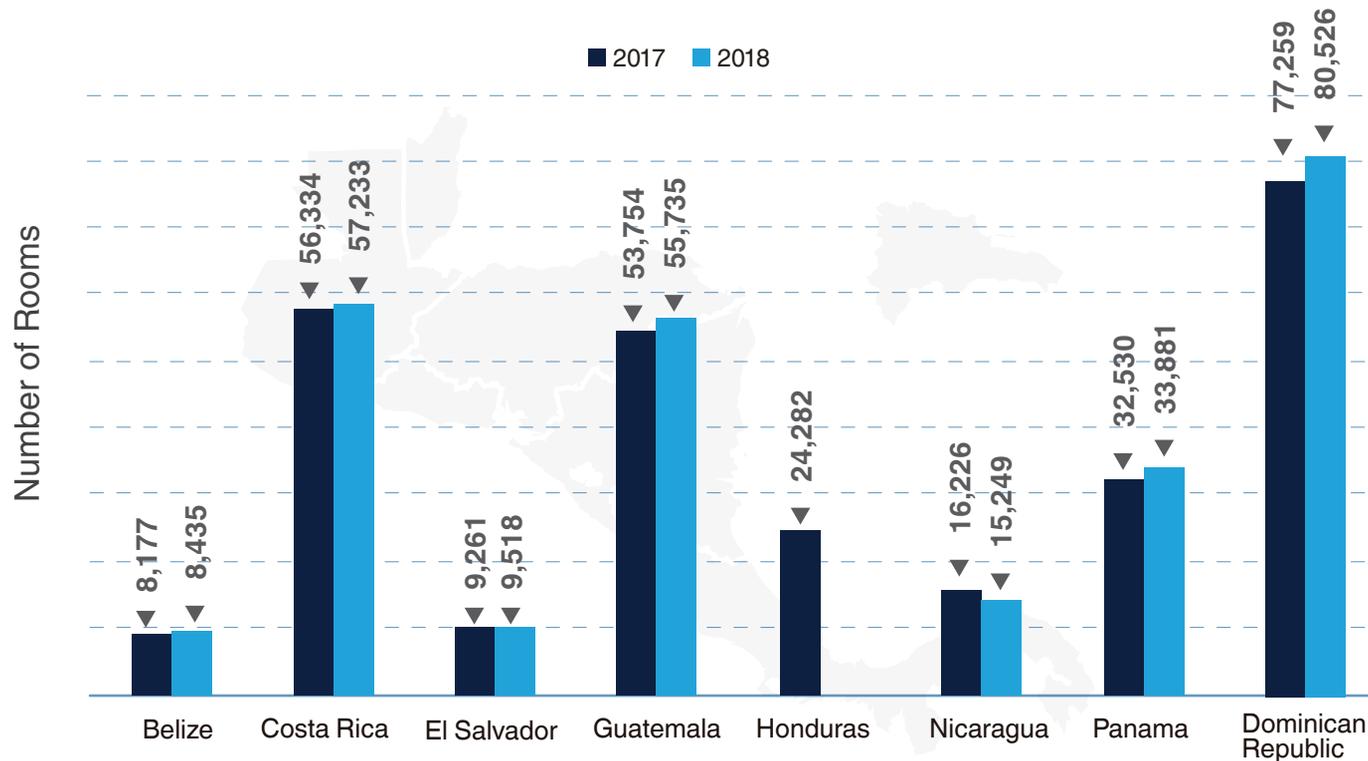
**Graph 16: Establishments that provide lodging
Variation (%) - period 2017-2018**



4.3.1.2 Number of Rooms

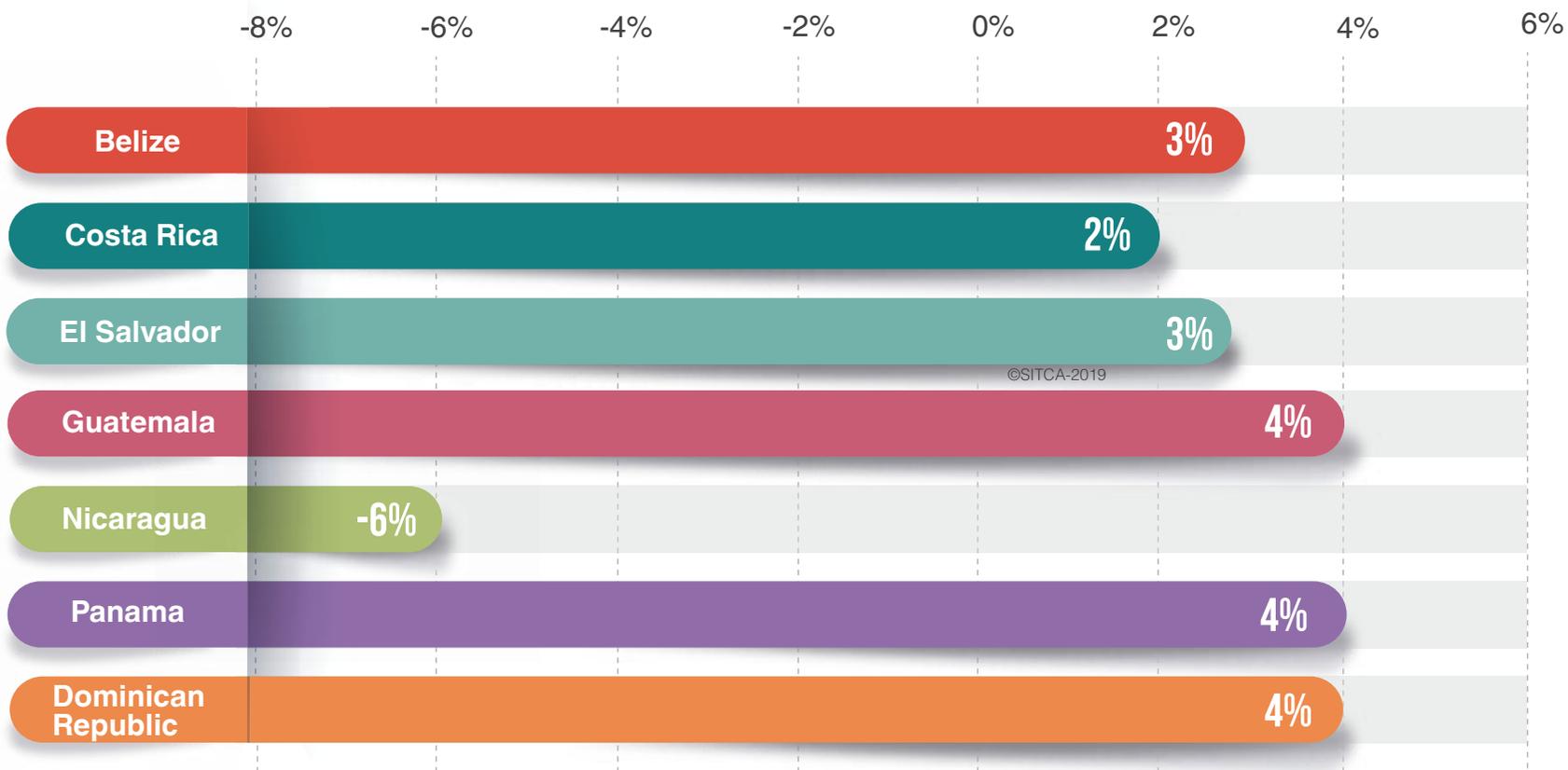
In 2018, the National Tourism Authorities of the SICA member countries reported 260,577 rooms available within the lodging offer.¹⁵

**Graph 17: Number of rooms that provide lodging at regional level
2017-2018**



¹⁴ For 2018, data for Honduras is not included.

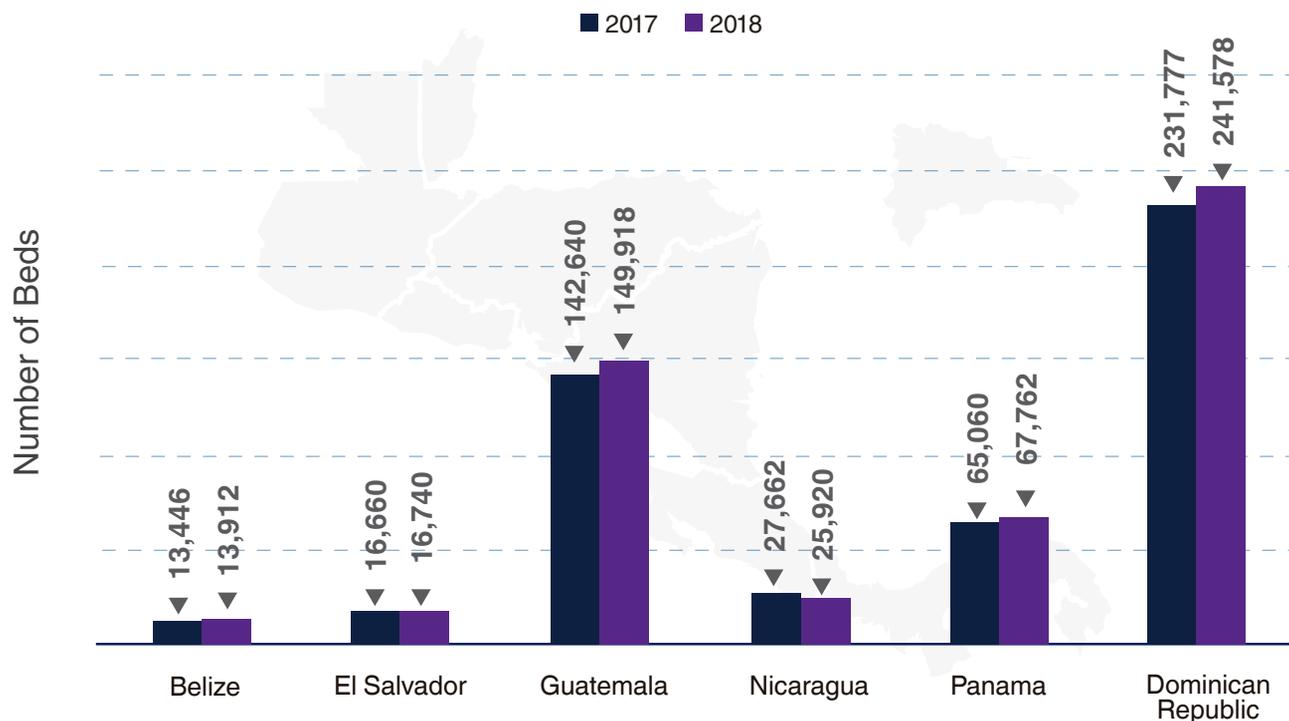
Graph 18: Room Supply
Variation (%) - period 2017-2018



– 4.3.1.3 Number of Beds

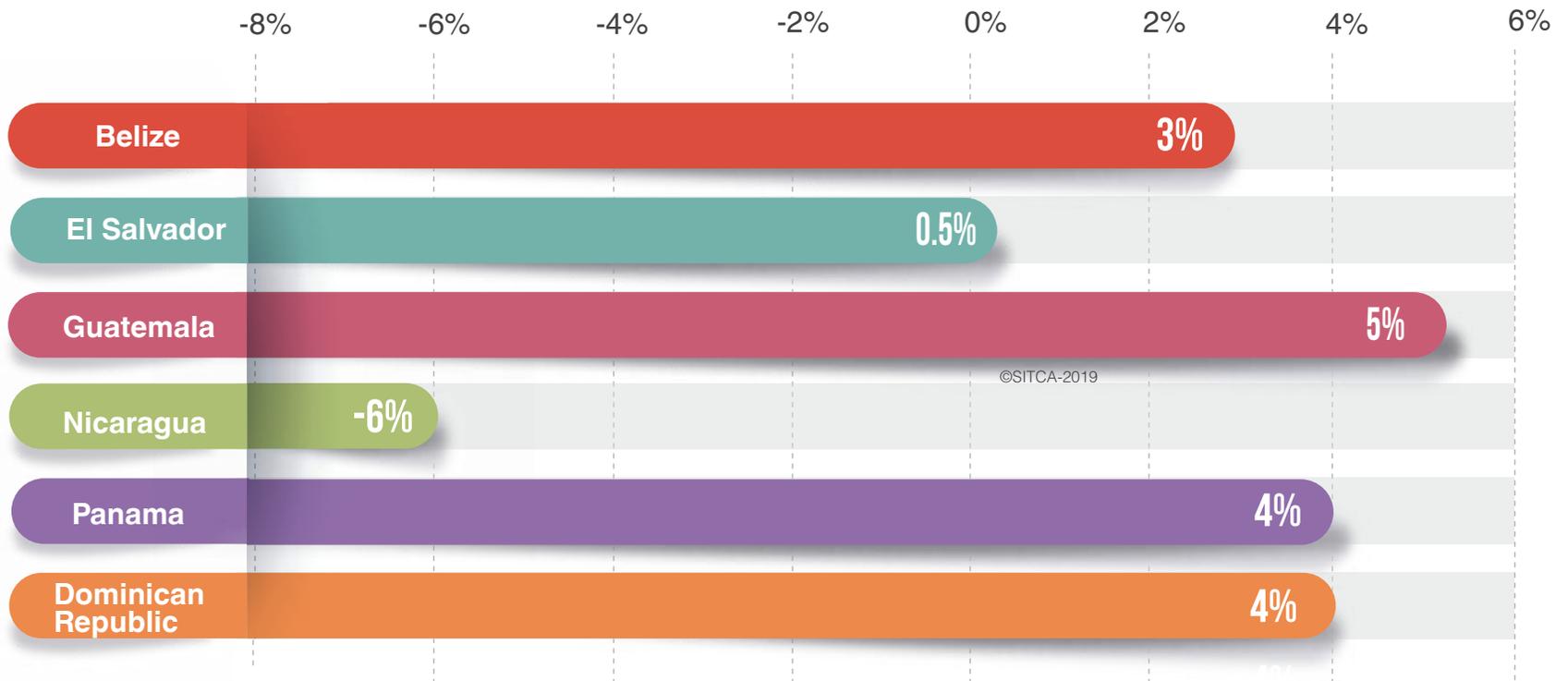
At the end of 2018, SICA member countries reported 515,830 beds included in the lodging offer, with a growth rate of 4%, compared to 2017¹⁶.

**Graph 19: Number of beds in the regional accommodation offer
Año 2017-2018**



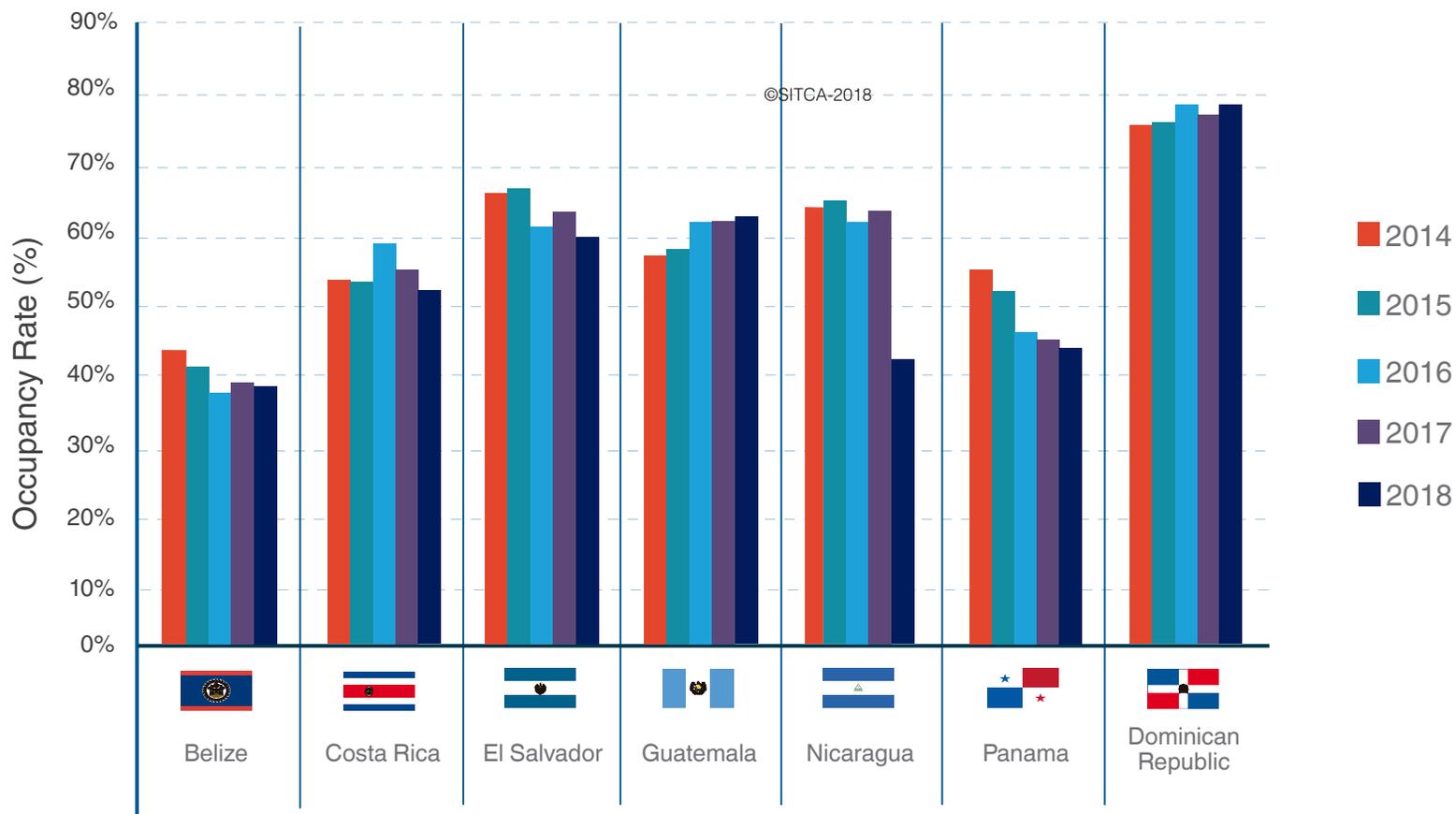
¹⁶ Costa Rica and Honduras did not report this data.

**Graph 20: Beds Supply
Variation (%) - period 2017-2018**



4.3.1.4 Hotel occupancy

Graph 21: Hotel Occupancy Rate
 Selected period - Percentage (%) of total capacity
 Trend 2014-2018



● 4.3.2 Travel Agencies ¹⁶

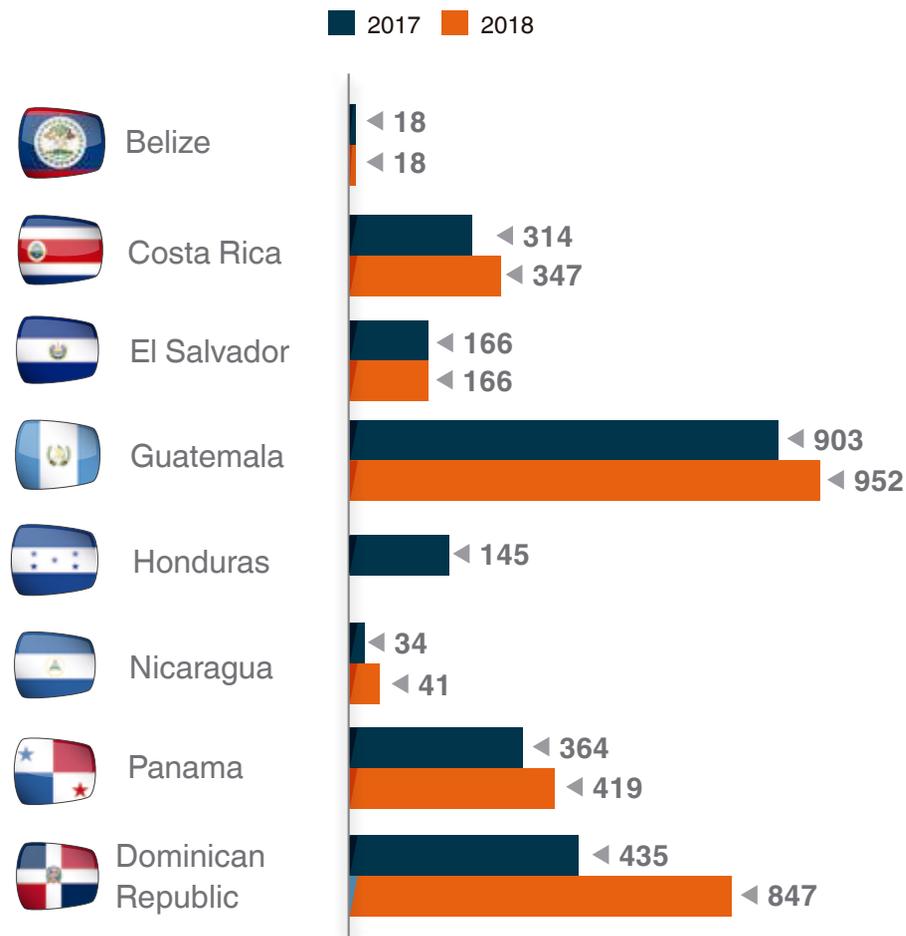


In 2018, the countries of the Central American Integration System (SICA) and the Dominican Republic, registered a total of 2,790 travel agencies, representing a joint growth of 17.3% over the previous year.

The Dominican Republic positioned itself with the greatest increase in the number of registered travel agencies. This country perceived an increase of 95% compared to 2017. In second place, we find Nicaragua with a growth of 17% in this segment, followed in third position by Panama with 15%.

2017	2,379
2018	2,790

Graph 22: Number of travel agencies 2017 - 2018



¹⁶ Costa Rica (CR) data updated for 2017

Data from Honduras (HN) for the year 2017 is included, 2018 does not incorporate data from Honduras.



V. ECONOMIC DATA

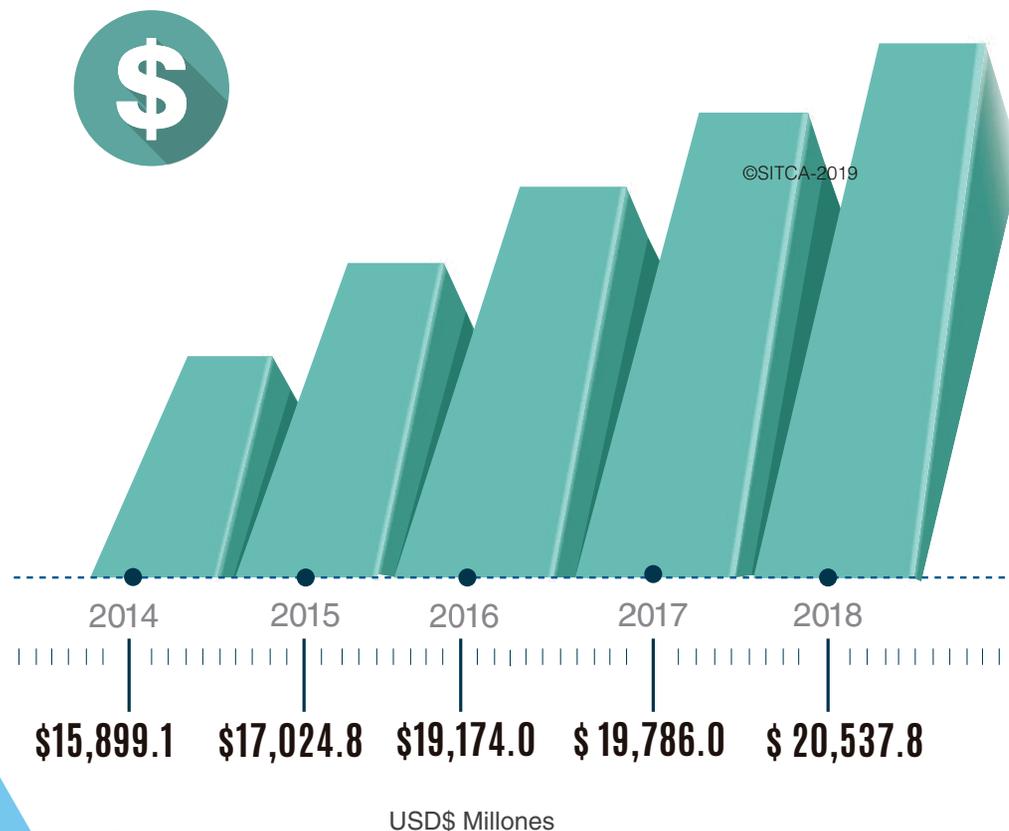
► 5.1 Revenues generated from tourism¹⁷

During 2018, the SICA region generated around US \$ 20.5378 billion in tourism, obtaining a 3.8% growth compared to 2017.

The countries with the highest participation of the total revenue generated are Dominican Republic (37%), Panama (22%) and Costa Rica (19%).

The percentages of growths highlighted in the 2017-2018 period obtained by; Belize with 23%, followed by El Salvador (21%) and finally the Dominican Republic (5%).

**Graph 23: Income generated by tourism
SICA member countries
2014 – 2018
US \$ Millions of Dollars**



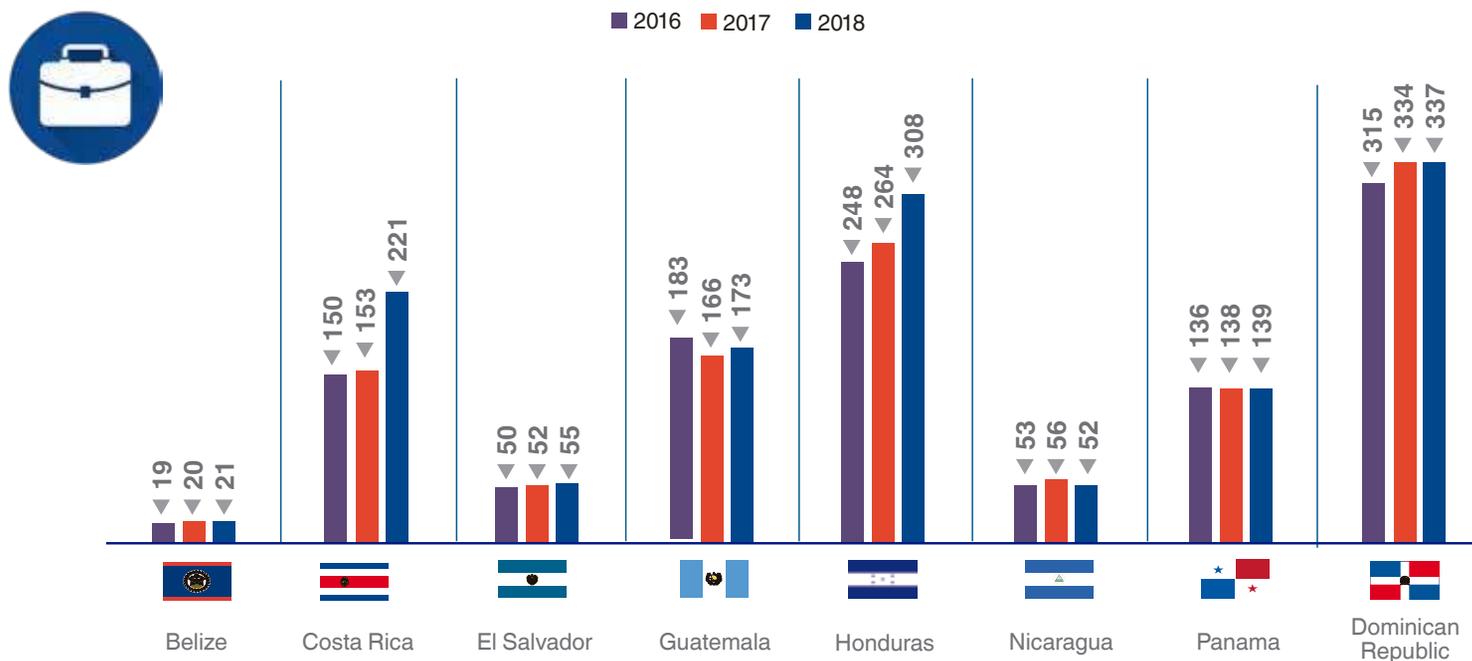
¹⁷Update figure 2017; Belize and Costa Rica - 2018 figures for Honduras correspond to projections
Source: Information provided by the National Tourism Authorities of the Countries members of the Central American Integration System

► 5.2 Direct and indirect jobs generated from tourism¹⁸

In 2018, tourism generated 1.3 million jobs in the SICA region, with a growth percentage of 10%.

The countries with the highest participation in total jobs generated are: Honduras (26%), Dominican Republic (23%), and Costa Rica (17%). In the fourth position is Panama with 11%.

**Graph 24: Distribution of formal jobs in the tourism sector
SICA Region- Figures in Thousands of people, 2016-2018**



¹⁸Source: National Tourism Administrations of SICA member countries
2016 figure revalidated - Dominican Republic Ministry of Tourism
Figure 2015, 2016, 2017 revalidated by Honduras
2018 figure - preliminary for Costa Rica (subject to change)
2018 data subject to updated

GLOSSARY

CATA – Central America Tourism Agency

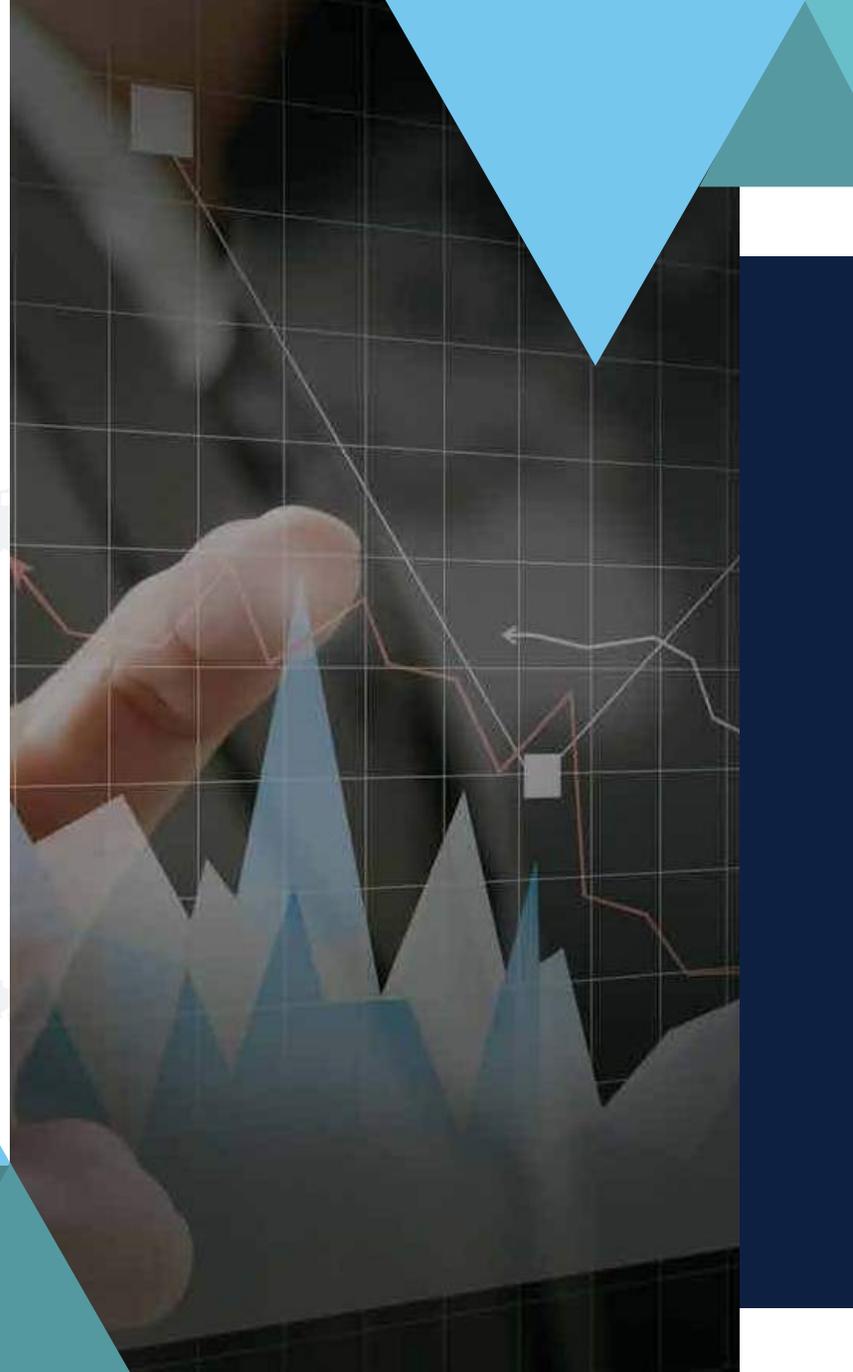
CCT – Central American Tourism Council

NTA – National Tourism Authorities

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

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

UNWTO – United Nations World Tourism Organization



CONTACTS

Countries	Entity	Contact
Belize	Belize Tourism Board (BTB)	www.travelbelize.org info@travelbelize.org (501) 227-2420
Costa Rica	COSTA RICAN TOURISM INSTITUTE (ICT)	www.visitecostarica.com info@visitcostarica.com (506)2299-5800
El Salvador	MINISTRY OF TOURISM (MITUR)	www.mitur.gb.sv/ (503)2243-7835
Guatemala	GUATEMALAN TOURISM INSTITUTE (INGUAT)	www.visitguatemala.com info@inguat.gob.gt (502)2421-2800
Honduras	HONDURAN TOURISM INSTITUTE (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	PANAMA TOURISM AUTHORITY (ATP)	www.atp.gob.pa mercadeo@atp.gob.pa (507) 526-7000
Dominican Republic	MINISTRY OF TOURISM (MITUR)	www.sectur.gob.do sectur@sectur.gov.do (809) 221-4660

Eight countries *A single Region*





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