

TOURISM SECTOR FRAMEWORK DOCUMENT

ENVIRONMENT, RURAL DEVELOPMENT, AND DISASTER RISK MANAGEMENT DIVISION

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This document was prepared by the project team consisting of: Adela Moreda, Project Team Leader (CSD/RND); Denise Levy (CSD/RND); Adrian Risso (CSD/RND); and Elizabeth Chávez (CSD/RND), who assisted in the production of this document, under the coordination of Pedro Martel, Division Chief (CSD/RND). The team is grateful for the comments and inputs received from Allen Blackman (CSD/CSD); specialists in CSD/RND, CSD/CCS, IDB Invest, and IDB Lab; and Héctor Valdés (consultant).

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ABBREVIATIONS

CCN	Código de Conducta Nacional para la Protección de las Niñas, Niños y Adolescentes en el Sector de los Viajes y el Turismo [National Code of Conduct for the Protection of Children and Adolescents in the Travel and Tourism Sector]
CIAT	Inter-American Center of Tax Administrations
DMO	Destination management organization
ECLAC	Economic Commission for Latin America and the Caribbean
FDI	Foreign direct investment
GDP	Gross domestic product
IATA	International Air Transport Association
ICEFI	Instituto Centroamericano de Estudios Fiscales [Central American Institute for Fiscal Studies]
ICT	Information and communications technology
IFC	International Finance Corporation
IGBE	Instituto Brasileiro de Geografia e Estatística [Brazilian Institute for Geography and Statistics]
ILO	International Labor Organization
IMF	International Monetary Fund
IPCC	Intergovernmental Panel on Climate Change
IPEA	Instituto de Pesquisa Econômica Aplicada [Institute for Applied Economic Research]
LAC	Latin America and the Caribbean
MINCETUR	Ministry of Foreign Trade and Tourism of Peru
MINCOMERCIO	Ministry of Trade, Industry, and Tourism of Colombia
MSMEs	Micro, small, and medium-sized enterprises
OAS	Organization of American States
OECD	Organisation for Economic Cooperation and Development
PPP	Public-private partnership
SFD	Sector Framework Document
TTCI	Travel and Tourism Competitiveness Index
UN-DESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNWTO	World Tourism Organization
WEF	World Economic Forum
WTTC	World Travel and Tourism Council
ZOIT	Zonas de interés turístico [Areas of tourist interest]

EXECUTIVE SUMMARY

TOURISM SECTOR FRAMEWORK DOCUMENT

Tourism is a significant driver of economic growth for Latin American and Caribbean countries. Taking into account its direct, indirect, and induced impacts, tourism accounted for 10% of Latin American GDP and 14% of Caribbean GDP in 2019. When adequately planned and managed, tourism can also yield a series of social and environmental benefits.

The region's tourism sector faces five pressing challenges. COVID-19 represents a threat to survival of the sector, which is experiencing a slow and uneven recovery. This health crisis comes in addition to four pre-existing structural challenges in the sector, relating to weak performance in: (i) the generation of economic benefits from tourism; (ii) the distribution of these benefits to groups in vulnerable conditions; (iii) environmental sustainability and climate management in the sector; and (iv) tourism governance as a crosscutting means of overcoming these challenges. The factors that determine each challenge are summarized below, together with the policies needed to address them.

First challenge: Strengthen recovery of the regional tourism sector in the wake of the COVID-19 shock. Tourism has been one of the sectors hardest hit by the COVID-19 crisis. Direct regional tourism GDP fell by half in 2020, a far greater contraction than experienced in the services sector as a whole (-6%) or in other sectors such as industry (-7%). Tourism has been responsible for just over one-third of the 7% drop in regional GDP during the pandemic. The intensity of the COVID-19 shock has varied across countries as a function of their dependence on tourism. Consequently, direct tourism GDP has declined by 66% in the Caribbean, which is above the regional average. The sector remains mired in uncertainty due to the persistence of virus outbreaks and differing levels of vaccination. Recovery seems unlikely to follow the patterns of previous crises, with the consequences of the pandemic likely to last into the medium term, including a shift in tourism demand preferences in favor of destinations perceived as safe.

The immediate response to COVID-19 has involved two types of policies: (i) support for the tourism enterprise sector; and (ii) adaptation to new demand-side priorities in tourism. Public sector support measures have been critical, as a significant proportion of regional tourism enterprises are micro, small, and medium-sized enterprises (MSMEs) (99% in the case of hospitality, used as a proxy for the sector as a whole). These lack sufficient financial and technical flexibility to weather long periods of inactivity. Initial measures focused on providing liquidity to businesses and protecting the most vulnerable workers and households. Meanwhile, countries have also developed biosafety protocols and digital health certificates to facilitate travel, with the aim of stimulating demand from tourism segments that place a premium on safety. To strengthen recovery in Latin America and the Caribbean in the medium term while also improving future crisis management and tourism resilience, evaluations are urgently needed of the relative effectiveness of the different types of support provided.

Second challenge: Increase tourism's economic benefits and contribution to the local economy. Notwithstanding a gradual increase in tourism expenditure in the region in the years preceding the pandemic, spending in Latin America per international arrival was one of the lowest in the world in the 2014-2019 period (US\$726 versus a world average of US\$1,026). At the same time, the Caribbean's share of world tourism expenditure has stagnated at 2% since 2010 due to faster growth in competing regions. Domestic spending

growth in the region was also below the world average from 2010 to 2019 (an average of 3% versus 45%). Tourism linkages with local economies in the region are weak, and the overall tourism multiplier for Latin America and the Caribbean is far below the world average (1.26 versus 1.52).

This performance is driven by at least four factors. The first relates to weaknesses in tourism planning, as reflected in the high geographic concentration of investment and spending and the consequent underutilization of the region's tourism potential. The second is the weakness of tourism intelligence systems, which leads to excessive dependence on a small number of source markets and creates vulnerabilities for the sector. A third, underlying factor is labor productivity in the sector, which is low and declining (-7% from 2010 to 2019) due to the prevalence of MSMEs with minimal technical, technological, and financial resources. A final factor is the inadequacy of the enabling factors for tourism in Latin America and the Caribbean (e.g., infrastructure and human resources), as reflected in the Travel and Tourism Competitiveness Index (TTCI) compiled by the World Economic Forum (WEF).

One of the keys to addressing these factors involves developing robust market intelligence that can help to identify trends in tourism supply and demand. Market intelligence also provides a better understanding of the structure of spending in each segment of tourism demand, as well as its relationship with the destination economy and its local multiplier effect. Improved market knowledge facilitates more effective identification and prioritization of investments to address the determinants of travel decisions ("pull" factors, which relate to the characteristics of the destination, and "push" factors, which relate to the characteristics of demand). It also supports the design of regulatory, technical, and financial instruments that are thoroughly adapted to the problems of weak productivity and poor linkages between tourism activities and local economies.

Third challenge: Strengthen the distribution of tourism benefits to vulnerable groups in Latin America and the Caribbean. Despite the opportunities for social inclusion offered by tourism, such potential is not always fulfilled. There are persistent pockets of poverty and inequality in some destinations in the region, while examples of segregation based on gender, race, age, physical ability, and other factors are also observed that must be reduced to a minimum. These problems are rooted in high levels of informality (generally linked to unstable, low-productivity employment), weaknesses in professional training, and a lack of disaggregated data on the impact of tourism on different types of vulnerable groups in the destinations.

To address this challenge, tourism policies must strengthen their focus on vulnerable groups, improving their training and knowledge of the sector and access to capital and markets, as well as formalizing their jobs and businesses. Inclusion can also be accelerated by expanding the opportunities for tourism consumption on the part of the most vulnerable groups, using segmented incentives and structures such as social or accessible tourism.

Fourth challenge: Strengthen environmental and climate management in tourism. While tourism in the region is adversely affected by environmental degradation caused by other economic activities, it also is also a contributor to that degradation. Factors underlying this problem include gaps in the regulatory framework and its enforcement, insufficient levels of financing for environmental conservation, a lack of information regarding the value of natural capital, and poor cross-sector coordination. With respect to climate change, the tourism sector in Latin America and the Caribbean faces a level of risk that ranges from medium to very high. Tourism is also a net contributor to global emissions.

In light of this challenge, the region needs policies that protect environmental quality in destinations by strengthening enforcement of the regulatory framework and also developing systematic planning, zoning, and impact assessment measures that preempt and mitigate the negative effects of economic activities on destinations, including those of the tourism sector itself. Environmental information systems, economic tools, and the transition to the circular economy in tourism represent important assets for improving environmental management in the sector. Climate adaptation strategies also need to be reinforced by creating the necessary analytical and technical capabilities in the sector, while also promoting the development of innovative opportunities for the use of natural capital, such as green and blue infrastructure. At the same time, the region needs to move toward the goal of low-carbon tourism.

Fifth challenge: Improve tourism governance in Latin America and the Caribbean.

Tourism sector governance involves coordinating three sets of actors: private sector companies providing tourism services, a variety of public sector authorities, and local communities. Tourism governance is particularly difficult because private sector actors are highly fragmented, the tourism authorities have to coordinate activities across different levels of government and with other sectors, and meaningful participation by local communities is required in order to align tourism with local needs. Tourism governance in Latin America and the Caribbean is generally weak: it is characterized by low levels of technical capacity and budget funding in national and subnational tourism institutions, a situation that hinders coordination with the private sector. There are also problems of insufficient participation by local communities, low levels of interagency coordination, and an excessive dependence on fiscal incentives to stimulate private investment. Meanwhile, new technologies have created new governance challenges due to an influx of new actors who have their own set of business rules.

To tackle this challenge, there is an urgent need to strengthen the capacities of tourism institutions so that they can successfully lead the sector at the subnational, national, and supranational levels. This should include support for formulating sector policies and programs that help to determine shared public and private sector objectives. The development of destination management organizations (DMOs) or tourism-related public-private partnerships (PPPs) can accelerate public-private coordination and leverage the funds needed to develop the sector. It is also important to respond to the determinants of foreign and local tourism investment by strengthening institutions and legal certainty. In addition, technologies can provide critical support for improving tourism governance by providing new tourism planning and management tools, as well as facilitating citizen participation and cross-sector coordination through structured technology management approaches, such as smart tourism destinations and updated regulatory frameworks.

I. THE TOURISM SECTOR FRAMEWORK DOCUMENT IN THE CONTEXT OF EXISTING REGULATIONS, THE INSTITUTIONAL STRATEGY, AND INTERNATIONAL AGREEMENTS

- 1.1 The Tourism Sector Framework Document guides the IDB Group's work in the tourism sector with the countries of Latin America and the Caribbean.¹ For the purposes of this sector framework document (SFD), "tourism sector" and "tourism" refer to the set of tourism industries (also known as tourism activities) that primarily generate products characteristic of tourism, such as lodging, food and beverage services, transportation, travel agencies, cultural services, and sports and recreation services. Products characteristic of tourism are goods and services for which supply would shrink considerably in the absence of visitors. A visitor is a traveler taking a trip of less than one year to a destination outside his/her usual environment, for any purpose (business, leisure, or other personal reason) other than to be employed by a resident entity located in the country or place visited. A visitor is classified as a tourist if his/her trip includes an overnight stay. Visitors who do not stay overnight are classified as excursionists ([UNWTO](#), 2008).
- 1.2 This SFD has been prepared in accordance with the document, "Strategies, Policies, Sector Frameworks, and Guidelines at the IDB" (document GN-2670-5), which stipulates that Sector Framework Documents (SFDs) should be prepared. Pursuant to the provisions of that document, this SFD replaces the previous Tourism SFD (document GN-2779-7). The Tourism SFD is one of 22 prepared under the framework of document GN-2670-5, which together provide a comprehensive vision of development challenges in the Latin American and Caribbean region. It is complemented by the following SFDs: (i) the Transportation SFD, with regard to access and connectivity in tourism destinations; (ii) the Citizen Security and Justice SFD, given the need to safeguard security conditions in tourism destinations; (iii) the Labor SFD, due to the need for efficient labor markets to create and maintain formal employment and decent working conditions in the tourism sector; (iv) the Integration and Trade SFD, as the tourism sector generates trade transactions from service exports and benefits from foreign investment, in addition to the existence of regional public goods with high potential for tourism integration; (v) the Housing and Urban Development SFD, regarding heritage-rich urban areas that can be developed for tourism purposes; (vi) the Support to SMEs and Financial Access/Supervision SFD, concerning access to financial services by the tourism industry; (vii) the Water and Sanitation SFD and the Energy SFD, regarding the delivery of public utilities that pave the way for tourism activity; (viii) the Decentralization and Subnational Governments SFD, given the need to establish robust institutions at the subnational level, which is the level that pertains to tourism destinations; (ix) the Social Protection and Poverty SFD and the Gender and Diversity SFD, given the need to distribute tourism benefits to the most vulnerable population segments; (x) the Climate Change SFD, in view of the need to promote mitigation and adaptation investments in tourism destinations; (xi) the Environment and Biodiversity SFD, given the importance of protecting natural heritage assets and biodiversity as factors in competitiveness and tourism sustainability; (xii) the Innovation, Science, and Technology SFD, due to the role of innovation and technology in underpinning tourism competitiveness; (xiii) the Fiscal Policy and Management SFD, due to the relationships between tourism and fiscal revenue and spending in the destinations;

¹ References to Latin America and the Caribbean (or "the region") and its subregions in this SFD observe strictly geographical criteria and do not relate to the Bank's internal structure.

- (xiv) the Health SFD, given the importance of health services to travel decisions and for tackling health crises such as COVID-19; and (xv) the Skills Development SFD, in light of the importance of strengthening human capabilities in the tourism sector.
- 1.3 This document is consistent with the Second Update to the Institutional Strategy of the IDB Group (document AB-3190-2) as it supports the following crosscutting areas: mitigating climate change and improving environmental sustainability in the region, fostering gender equality and diversity, and strengthening sector institutional capacity. It also supports the following three structural challenges in the region: (i) reducing social exclusion and inequality; (ii) improving productivity and innovation; and (iii) enhancing economic integration.
 - 1.4 This SFD also relates to: (i) the Integrated Strategy for Climate Change Adaptation and Mitigation, and Sustainable and Renewable Energy (document GN-2609-1), the objective of which is to facilitate low-carbon development, environmental sustainability, and reduced climate change vulnerability in Latin America and the Caribbean; (ii) the Sustainable Infrastructure Strategy for Competitiveness and Inclusive Growth (document GN-2710-5), the objective of which is to support the construction and maintenance of socially and environmentally sustainable infrastructure; and (iii) the Sector Strategy to Support Competitive Global and Regional Integration (document GN-2565-4), which prioritizes the sustainable use of regional public goods with potential for tourism development. It is also aligned with the new Environmental and Social Policy Framework (document GN-2965-23), in that it recognizes the importance of crosscutting socioenvironmental management in tourism.
 - 1.5 The SFD is aligned with the Bank's Vision 2025 strategy (document AB-3266), as it prioritizes both the need for robust recovery in the tourism sector as part of sustainable and inclusive economic growth following the COVID-19 shock, as well as the creation of a comprehensive sector support framework that strengthens the IDB Group's value proposition. In this respect, the document places special emphasis on the support required by micro, small, and medium-sized enterprises (MSMEs) in the tourism sector, as well as the digital transformation experienced in the sector, social inclusion through tourism, and the challenges associated with climate change.
 - 1.6 This Tourism SFD relates either directly or indirectly to all of the Sustainable Development Goals (SDGs). The tourism sector is explicitly included in several of the targets under SDGs 8, 12, and 14, which relate to: (i) inclusive and sustainable economic growth; (ii) sustainable consumption and production; and (iii) sustainable use of the oceans and marine resources.
 - 1.7 The rest of the document is structured as follows: Section II describes the development challenges faced by tourism in Latin America and the Caribbean; Section III provides evidence surrounding the effectiveness of policies and programs to tackle the challenges identified in Section II; Section IV summarizes the lessons learned by the IDB Group; and Section V, lastly, includes the lines of action that will serve as a point of reference for the tourism sector in the region.

II. MAIN CHALLENGES FOR THE REGION IN THE TOURISM SECTOR

- 2.1 **The Latin American and Caribbean region has enormous tourism potential, thanks to its wealth of natural and cultural resources.** Despite accounting for only 16% of the world's land mass, Latin America and the Caribbean contains 12 of the planet's 14 land biomes and 8 of its 17 megadiverse countries (United Nations Development Programme, 2010; Blackman et al., 2014; United Nations Environment Programme World Conservation Monitoring Centre, 2016; Durango et al., 2019). This wealth of natural capital is reflected in a large number of countries with a high level of attractiveness to tourists. The region also offers outstanding cultural resources, such as the legacies of pre-Columbian cultures and the colonial period, an indigenous world view that is connected with environmental conservation, and a diverse and lively contemporary culture. Of the list of World Heritage Sites designated by the United Nations Organization for Education, Science, and Culture (UNESCO), Latin America and the Caribbean accounts for 97 of the 869 cultural sites and 8 of the 39 mixed sites.
- 2.2 **Tourism makes a significant contribution to both GDP and employment in the region, particularly in the Caribbean.** Including indirect and induced effects, the sector accounted for 10% of Latin American GDP in 2019 (US\$442 billion) and 14% of Caribbean GDP (US\$58 billion) (WTTC, 2021). Tourism also generated 9% of total employment in Latin America (24 million jobs) and 15% in the Caribbean (2.8 million jobs).
- 2.3 **Tourism thus constitutes an important driver of economic growth for Latin America and the Caribbean.** Using panel data for 21 Latin American and Caribbean countries, Eugenio-Martín et al. (2004) provide evidence that tourism contributes to economic development, particularly in low- and middle-income countries. An economic model developed by Fayissa et al. (2009) suggests that a 10% increase in tourism expenditure in Latin America and the Caribbean raises per capita GDP by 0.4%. Fuinhas et al. (2020) also confirm the positive correlation between tourism and economic growth in the region.
- 2.4 **Tourism can also yield social and environmental benefits.** In Nicaragua, for example, it was found that a 1% rise in foreign exchange earnings from tourism leads to a 0.5% decline in poverty (Croes and Vanegas, 2008). In Panama, 20% of income from tourism expenditure is captured by poor households (Klytchnikova and Dorosh, 2012). Tourism also has the potential to generate financial resources for conservation and incentives to protect the natural resources that stimulate tourism demand (Balmford et al., 2009; Buckley, 2011; Gunter et al., 2017; Spenceley et al., 2019; Khan and Hou, 2021).
- 2.5 **Latin America and the Caribbean experienced a steady expansion of the tourism sector in the decade leading up to the pandemic ([Figure 1](#)).** Inbound tourism expenditure grew by 62% in the region from 2010 to 2019, exceeding US\$100 billion in 2019 and accounting for 7% of the world market (UNWTO, 2020a). Overall growth in Latin America and the Caribbean was slightly above the worldwide average (5.5% compared with 4.7%). In terms of subregions, Mexico experienced the greatest increase over that period (an annual rate of 8%), followed by the Andean Community and Central America (both at 7%). Behind that were the Caribbean (4%) and the Southern Cone (2%). In addition, domestic tourism expenditure in the region

reached US\$329 billion in 2019, equivalent to 8% of worldwide domestic tourism expenditure.

- 2.6 **Despite the growth in tourism before the pandemic and its ability to generate socioeconomic and environmental benefits, the sector faces five challenges that must be addressed urgently.** The COVID-19 crisis imperils the survival of the tourism sector in Latin American and the Caribbean, and it comes in addition to four structural challenges in the sector, which are linked to weak performance in (i) the generation of economic benefits from tourism and their contribution to the local economy; (ii) the distribution of these benefits to vulnerable groups; (iii) environmental sustainability and climate management in the sector; and (iv) tourism governance as a crosscutting means of overcoming these challenges. It should be noted that although this SFD divides the most frequently observed tourism challenges in the region into groups, each subregion and country faces its own specific circumstances.

A. Challenge 1: Strengthen recovery of the tourism sector in the wake of the COVID-19 shock

- 2.7 **Tourism has been one of the sectors hardest hit by the COVID-19 pandemic.** The number of international tourist arrivals fell 73% worldwide in 2020 (UNWTO, 2021). In the case of Latin America and the Caribbean, numbers fell by 60% overall, though the extent of the decline differed across subregions: 76% in the Andean community, 71% in Central America, 69% in the Southern Cone and the Caribbean, and 46% in Mexico, which opted to keep its airspace open (IDB, 2021). Inbound tourism expenditure fell by 69% worldwide in 2020. Similarly, it dropped by 68% in the Caribbean and slightly less in Latin America (53%). Lastly, worldwide domestic tourism expenditure contracted 45%, while in Latin America it fell 42% and in the Caribbean by 50% (WTTC, 2021). These developments caused direct tourism GDP to contract by 50% in Latin America and the Caribbean in 2020, far higher than the declines experienced in industry (-7%) and in the services sector as a whole (-6%) (IDB, 2021; WTTC, 2021; World Development Indicators, 2021). The reduction in direct tourism GDP was higher in the Caribbean (-65%) than in Latin America (-49%). Moreover, 5.2 million tourism jobs were lost in Latin America in 2020 (-22%), with a further 680,000 lost in the Caribbean (-25%) (IDB, 2021; WTTC, 2021).
- 2.8 **The intensity of the COVID-19 shock has varied across countries as a function of their dependence on tourism.** In terms of the sector's importance to GDP and employment, the Caribbean is the most exposed region to tourism in the world, and therefore the most exposed to the impact of COVID-19 (paragraph 2.2; [Table 1](#); Mooney et al., 2020). In both Jamaica and Barbados, for example, tourism represented 31% of the economy in 2019. Tourist arrivals in the Caribbean are dependent on the international market, which generates 74% of total tourism expenditure, compared with only 23% in the Latin American countries. A disaggregated analysis shows that domestic tourism generates 67% of total tourism spending on average in South America and 45% in Central America (WTTC, 2021). The intensity of the shock and the recovery depend on the respective source markets.
- 2.9 **Prospects for the sector remain mired in uncertainty.** This uncertainty stems from the disparate pace of vaccination, the emergence of new virus variants, and the persistence of virus outbreaks and cases, together with volatile confidence on the demand side. A survey of international travelers published in October 2021

reveals that 78% of respondents will not travel immediately once the pandemic is contained but rather will wait between one month and one year; 75% believe that quarantines should be lifted in order to accelerate a recovery in confidence; and 75% think that the cost of COVID-19 tests is a significant barrier (IATA, 2021). Preliminary estimates from the UNWTO² on tourism demand project an increase of 27% in international arrivals in Latin America and the Caribbean in 2021, over 2020, though that improvement still represents a -49% decline over 2019. Disaggregating this data, international arrivals in 2021 are projected to recover by 72% in the Caribbean and by 15% in Latin America in comparison with 2020. For 2022, IDB estimates³ from late January put the growth in international arrivals at 51% in Latin America and the Caribbean with respect to the 2021 level (still -27% below the 2019 level). It is important to note that ongoing monitoring of this market will be needed given the fluid environment. For instance, at the start of the year, tourism arrivals were projected to grow by 62% in 2022 for Latin America and the Caribbean, but the Omicron effect lowered these expectations by 11 percentage points in just three weeks.

- 2.10 **Recovery seems unlikely to follow the patterns of previous crises, and the consequences of the pandemic may even last into the medium term.** Although in recent decades the tourism sector has experienced crises linked to economic recessions, disasters, health threats (e.g., Zika, dengue, and avian flu), and security challenges, among other things, the sector has always demonstrated a tremendous ability to recover (Tejan and Safaa, 2018). The only instance of a significant drop (-4%) in international tourist arrivals in Latin America and the Caribbean was in 2009 at the time of the financial crisis (Mooney and Zegarra, 2020). The COVID-19 crisis has been different, however, due to its intensity, duration, and global reach, and it appears to have led to a crucial shift in the tourist psyche (Kock et al., 2020). Although it is very difficult to predict tourist behavior in the wake of a crisis (Vo Thanh, 2006), it is essential that new demand-side priorities be identified as quickly as possible. A number of exploratory studies of the behavior of tourism demand have highlighted several developments that need to be monitored to determine whether they are merely short term in nature or have become structural (paragraph 5.10). These include the following trends (Chebli and Ben Said, 2020; WTTC, 2020):
- a. **The pursuit of familiar, predictable surroundings.** Fear of infection or unforeseen quarantine requirements during travel has led to an increase in [domestic](#) and [regional](#) travel. Hotel reservations in Latin America and the Caribbean fell by -46% on average in the first quarter of 2021 when compared with the same period in 2019. Performance in the Caribbean has been better though, due to the subregion's proximity to the United States: hotel reservations there declined by only -10% in the first quarter and even increased 19.5% on average in March and April 2021 with respect to the [same months in 2019](#). Meanwhile, long-distance travel appears to be recovering at a slower pace.
 - b. **A preference for uncrowded locations.** This reflects a need to avoid crowds due to the risk of infection, and it may have implications for the geography of

² <https://www.unwto.org/unwto-tourism-recovery-tracker>.

³ 27 January 2022, based on the International Tourism Demand Model, which includes 19 countries from Latin America and the Caribbean: <https://www.iadb.org/en/sustainable-tourism/international-tourism-demand-model-itdm>.

tourism in the region: it provides an opportunity for emerging destinations and also forces established destinations to improve their management of tourist flows to avoid being perceived as risky.

- c. **Choosing open-air tourism destinations and activities.** This is linked to scientific evidence that the risk of infection is higher in poorly ventilated indoor spaces, thus benefiting tourism activities in natural, rural, and beach destinations to the detriment of other tourist attractions.
 - d. **A predisposition toward more digitally advanced destinations.** The prevailing uncertainty means that advance travel planning and reliable data on the situation in the destination have taken on considerable importance, with social media as the dominant source of information. The emergence of COVID-19 has also intensified the use of technology on the part of consumers, who have used it intensively for teleworking and communicating with friends and family. Tourism companies and destinations have also sought to accelerate recovery through the use of digital solutions (Cámara Colombiana de Informática y Telecomunicaciones, 2021). Accordingly, visitors now prefer contactless technologies to eliminate points of contact with their surroundings, use big data to monitor epidemiological data, and have replaced business trips with digital platforms, among other things.
 - e. **Safety as a key determinant of travel decisions.** This reinforces a trend that was already important before COVID-19: Sequeira and Nunes (2008) estimate that a 10% increase in country risk perceptions can reduce international visitor arrivals by 2%. This perception is multidimensional in nature, encompassing not only physical safety but also psychological and economic integrity (OAS et al., 2010). Health and hygiene have become a central factor in risk perceptions as a result of the pandemic.
- 2.11 **These demand factors have direct implications for tourism enterprises and their business models.** Most of the tourism enterprise sector in Latin America and the Caribbean consists of MSMEs, which generally have little technical and financial room for maneuver owing to their scant liquidity and limited access to credit (ECLAC, 2018b). This affects their ability to weather lengthy interruptions in activity and adapt to new health regulations and demand preferences.
- 2.12 **To strengthen tourism sector resilience, pre-existing challenges must be addressed as part of the pandemic recovery process.** A failure to act would aggravate the economic and socioenvironmental vulnerabilities already present in the sector that have been exposed by the COVID-19 crisis. The four most significant pre-existing challenges are discussed below.
- B. Challenge 2: Increase tourism's economic benefits and contribution to the local economy**
- 2.13 **The potential of tourism to generate economic development is directly linked to the volume of tourism expenditure and the ability of destinations to capture its benefits locally.** In this respect, Latin America and the Caribbean must strengthen the economic benefits of tourism and its contribution to the local economy, as demonstrated by the following indicators:
- a. **From 2014 to 2019, Latin America recorded one of the lowest levels of expenditure per international tourist arrival (US\$726), far below the world average (US\$1,026) and ahead of only Africa (US\$591).**

- b. **In the Caribbean, average expenditure per international tourist was above the world average (US\$1,227) but below that of North America and Asia-Pacific.** The Caribbean's share of world inbound tourism expenditure stagnated at 2% in the 2010-2019 period, due to the lower pace of growth experienced in comparison with competing destinations ([Figure 2](#) and [Figure 3](#)).
 - c. **There are also opportunities to increase domestic tourism expenditure.** This category of spending rose by only 3% in Latin America and the Caribbean from 2010 to 2019, compared with 45% growth worldwide ([Figure 4](#) and [Figure 5](#)).
 - d. **The linkages between tourism and local economies need to be strengthened.** These linkages can be measured through the relationship between the impact on GDP and visitor spending, which is known as the tourism [multiplier](#). Latin America generally demonstrates a greater ability to capture the benefits of tourism than the Caribbean: in 2019, Latin America's direct multiplier was 0.53, which was above that of the Caribbean (0.47, the same as the world average). Meanwhile, the total multiplier (including indirect and induced expenditure effects) was 1.26 in Latin America, compared with 1.22 in the Caribbean. Both multipliers fell far short of the world average (1.51), showing that the entire region needs to work to strengthen the indirect and induced effects of tourism ([Figure 6](#); [Table 2](#)). A specific example of a link between tourism and the local economy that could be strengthened is provided by a study conducted by the Bahia Department of Tourism (2009) in Brazil, which found that 79% of seafood consumed in hotels is imported from Pernambuco, despite the existence of local production. Another example is the strong integration of the value chain for the land-based tourism offerings of cruise ships, which limits the participation of small local suppliers and greater capture of tourism expenditure at the destination level. This trend includes the development of private ports and resorts by cruise ships throughout the Caribbean in recent years (Daly et al., 2017).
- 2.14 **The region's comparatively weaker performance is linked to several factors:**
- a. **A predominance of spontaneous models of tourism, and the absence of advance planning, around the best-known tourist attractions.** For this reason, tourism expenditure in Latin America and the Caribbean is highly concentrated in geographic terms, indicating underutilization of the region's tourism potential and a constraint in terms of generating expenditure. Regionally, Mexico and the Caribbean account for more than half of total inbound tourism expenditure (53% in 2019), while Mexico, Brazil, and Argentina represent 83% of domestic tourism expenditure. Patterns of tourism consumption are also highly concentrated within countries. Out of a total of 39 national nature parks in [Argentina](#), for example, just 4 accounted for 66% of visits between 2014 and 2019. In 2018, 88% of spending by international tourists in Uruguay was concentrated in 2 of the [country's](#) 7 tourism regions, while in [Mexico](#), 5 of the country's 193 archaeological zones attracted 59% of total visits in 2019. Iconic national or cultural tourist attractions, such as the [Galapagos Islands](#) (which receives 11 tourists per inhabitant) or [Machu Picchu](#) (which received 1.4 million visits in 2019) are symbols of the problems of mass

tourism faced by a number of destinations in the region, to the detriment of other, potentially attractive areas.

- b. **The weakness of tourism intelligence systems in the region is reflected in an absence of proactive demand segmentation.** As a result, less profitable visitor segments predominate, and there is a heightened dependence on a small number of markets. Some examples follow.

- (i) **A significant proportion of short-haul and excursion-based tourism with lower spending propensity than other segments of international demand.** Mexico and Central America received 125 million international visits in 2019, 50% of which were excursionists (i.e., their trips did not include an overnight stay, resulting in lower expenditure). In the specific case of [Mexico](#), crossborder tourism represented 47% of total international tourist arrivals in 2019, with lower average spending per tourist than other international arrivals (US\$61 versus US\$885). In addition, despite the fact that spending by cruise excursionists provides a significant injection of employment and revenue for the Latin American and Caribbean region—especially for the Caribbean, which is the principal global destination with 35% of total global offerings—the average tourism expenditure for overnight stays is much higher than for cruise visitors (US\$216 in daily spending per tourist and US\$865 in total spending per tourist, versus US\$101 per cruise visitor, in 2018).⁴ Although cruise excursionists account for approximately 24% of total international tourism visits to the Caribbean, Central America, and Mexico, they only contribute 3.5% of total revenue from these visits.⁵ Ojeda (2021) finds that the economic impact of cruise tourism in Mexico (which represents 20% of international tourism revenue) is lower than that of tourism that includes overnight stays. The evidence also suggests that in some cases cruise tourism may have crowding-out effects on stayover tourism, as Bresson and Logossah (2011) found in a panel analysis of 15 Caribbean countries from 1985 to 2004.
- (ii) **In several destinations in the region, a preponderance of visitors who stay in the homes of friends or relatives, with low propensity to spend.** Different analyses indicate that spending by visitors staying in the homes of friends or relatives is lower than that of visitors who stay in tourism establishments; production and employment multipliers are also lower (IDB, 2010c, 2012, and 2016).
- (iii) **Excessive dependency on a small number of source markets, creating vulnerabilities for some destinations** (paragraph 2.8; [Figure 7](#)). In the case of inbound tourism, this vulnerability was highlighted during the global recession of 2009, when the Caribbean was affected by the economic crisis in its primary source market, the United States. Another example is Central America, where 41% of

⁴ Average daily expenditure for the Caribbean, Central America, and Mexico, based on data from the Florida-Caribbean Cruise Association (2018) and the UNWTO <https://www.unwto.org/tourism-data/accommodation-demand-capacity>.

⁵ Author's calculation based on data from the Florida-Caribbean Cruise Association (2018) and the UNWTO (2019).

inbound flows originated in the United States and Canada (WTTC, 2021). In Mexico, tourism by residents accounted for 85% of total tourism expenditure in 2019 (US\$131 billion) (WTTC, 2021). However, domestic expenditure in Latin America and the Caribbean is more variable than worldwide domestic spending, with large rises and falls in the respective coefficients of variation, thus intensifying vulnerability to shifts in demand ([Figure 8](#)).

- c. **Weak tourism labor productivity.** Tourism GDP per worker in Latin America and the Caribbean ranked below the world average from 2010 to 2019 (US\$18,960 versus US\$21,908) and far below that in North America, Europe, and the Middle East (US\$80,142, US\$52,040, and US\$32,802, respectively) ([Figure 9](#), [Table 3](#)). While productivity grew by 15% internationally over the same period, in Latin America and the Caribbean it declined by -7%. Although more evidence is required from the region (paragraph 5.10), productivity appears to be affected by a lack of adequate training (paragraph 2.14d), high levels of informality, and precarious working conditions (paragraph 2.16). In the Department of Cuzco in Peru, the sales of informal tourism businesses are 12 times lower on average than those of formal companies (Benavente et al., 2021). Productivity is also affected by the predominance of MSMEs, the performance of which is weakened by scarce technical and financial resources and obsolete or barely productive technology (ECLAC, 2018b; IDB, 2017b). In Chile, for example, 58% of tourism enterprises lacked a website in 2018, while 79% of those with a website did not sell online (Department of Tourism, 2020). Resource constraints on the part of MSMEs lead to low levels of investment per worker in the sector, averaging US\$5,022 annually in Latin America and the Caribbean compared with US\$7,596 internationally (WTTC, 2021). This has a negative impact on tourism labor productivity, creating a vicious circle.
- d. **Low competitiveness of the enabling factors for tourism: the operating environment, infrastructure, tourism policy, and natural and cultural resource management.** The World Economic Forum (WEF) analyzes the factors that affect tourism competitiveness in its [Travel and Tourism Competitiveness Index](#) (TTCI). On a scale of 1 to 7 (7 being the maximum), the region's overall tourism competitiveness score of 3.8 in 2019 was lower than those for North America (5.2), Europe (4.3), and Asia-Pacific (4.2), surpassing only those of the Middle East and North Africa (3.7) and Sub-Saharan Africa (3.1). Disaggregating by subregion, the Caribbean scored 3.5 and Latin America, 4.1. A detailed analysis of competitiveness factors shows that Latin America and the Caribbean ranks relatively poorly with respect to the four pillars analyzed by the TTCI: (i) the region ranks second to last in the world as regards the enabling environment for tourism, which encompasses the business environment, safety and security, health and hygiene, human resources, and information and communications technology (ICT) readiness. Within this pillar, it is worth noting the region's below-average ranking (6%) for the relative capacity of human resources in its tourism sector; (ii) the region ranks also second to last under the infrastructure pillar (which includes private tourism offerings such as hotels); (iii) in the travel and tourism policy pillar (which encompasses tourism sector prioritization, price competitiveness, international openness, and environmental sustainability), Latin America and the Caribbean gains one position, ranking ahead of the

Middle East and North Africa but below North America, Europe, and Asia-Pacific; and (iv) the region occupies this same position in the natural and cultural resource management category ([Figure 10](#) to [Figure 15](#)). Weak tourism competitiveness in Latin America and the Caribbean reflects difficulties in tourism governance, as many of these factors require intense collaboration between the tourism authorities and other sectors, as well as improved coordination with the private sector to respond effectively to its needs.

C. Challenge 3: Strengthen the distribution of tourism benefits to groups in vulnerable conditions in Latin America and the Caribbean

2.15 **Management of the tourism value chain needs to be strengthened to improve the inclusion of groups in vulnerable conditions in Latin America and the Caribbean**, whether in terms of income, gender, race, age, physical ability, or other conditions. The positive effects of tourism on these groups depend on crosscutting enabling policies that have still not been firmly established due to weaknesses in regional tourism governance. This is highlighted by certain indicators:

- a. **Significant pockets of poverty and inequality persist in many regional destinations that are otherwise successful in terms of tourist arrivals and expenditure.** The State of Quintana Roo, for example, was the second destination in Mexico in 2019 in terms of international arrivals (37% of the total), and 52% of the state workforce was employed in [tourism](#) that year. Nonetheless, a high proportion of the population still experiences some form of social deprivation (42%), including lack of access to social security ([52%](#)). Cartagena, in Colombia, is another example: it is also the [second most important](#) destination in the country in terms of total international arrivals, yet in 2019 it recorded a monetary poverty rate of 46%, above the national average of [36%](#). In Brazil, additional growth of 10% in inbound tourism expenditure increases incomes across all population groups, but households with the lowest income levels are not the main beneficiaries of the increase (Blake et al., 2008).
- b. **Although female participation rates are relatively high in the region's tourism sector, problems of gender inequality remain.** Latin America and the Caribbean has the second-highest rate of female participation in the hospitality sector (a subsector that is frequently used as a proxy for the tourism sector as a whole). Women account for 60% of hospitality workers, with only Africa having a higher rate (69%) ([Figure 16](#); UNWTO et al., 2019). Nonetheless, occupational segregation can be seen in the case of female employees in Latin America, with women occupying a minority of professional management positions in tourism enterprises (37%). In addition, women with mid- or low-level qualifications experience worse working conditions than men (UNWTO et al., 2010). Segregation also leads to wage discrimination, as confirmed by 2019 data from [Brazil](#) showing that women in the tourism sector receive lower wages than their male peers (-33% less on average in the formal sector and -41% in the informal sector). Moreover, a high proportion of women perform unremunerated work in family businesses (70% in Latin America and 84% in the Caribbean) and may be vulnerable to abusive working conditions ([Figure 17](#); UNWTO et al., 2010). In fact, only 26% of women in the region's tourism sector contribute to some type of social security system (ECLAC, 2021). Lastly, there are a number of obstacles specific to women-led tourism

enterprises, such as age, fear of failure, education levels, and access to credit (Sarango et al., 2016).

- c. **Tourism has had a mixed impact on groups in vulnerable conditions in Latin America and the Caribbean.** In the case of Afro-descendant communities and indigenous peoples in Latin America, for example, Pereiro (2016) indicates that tourism has been perceived with optimism as it represents a source of additional income and local empowerment. However, other, more critical studies indicate that these communities have received few benefits from tourism and have been marginalized by the tourism production system, due in particular to unequal power relationships between tourism operators and communities (Cañada, 2010; Taylor, 2017; Ochoa, 2017). The following examples serve to further illustrate these uneven effects:

- (i) **Racial disparities.** An analysis of the tourism value chain in the city of Salvador, Bahia (IDB, 2015b) showed that white employees (15% of the total) have higher wages than their Afro-descendant and mixed-race peers (76% of all tourism workers).
- (ii) **Age-based disparities.** In the Caribbean, under-30s account for two thirds of the population, and UNESCO data (2019) show youth unemployment levels to be among the highest in the world (25%). In some countries (such as The Bahamas, Barbados, and Jamaica), the level of youth unemployment is triple that for adults.
- (iii) **Ability-based disparities.** Wages in Latin America and the Caribbean are much lower for employees with disabilities (IDB, 2019). A study in Belém, Brazil, found that hiring processes for hotel staff are carried out based on the type of disability; this creates exclusion, as it means that selection is not based on effective capability (Diniz de Sá et al., 2017).

- d. **The exclusion of groups in vulnerable conditions can also occur through the channel of tourism consumption.** A variety of factors contribute to this type of exclusion, one of which is disposable income (Schenkel, 2019). While 73% of European citizens engage in some type of tourism activity in any given year, the proportion in the Latin American countries is 48% in Argentina and Brazil, 40% in Mexico, and lower still in the rest of the countries. A second factor concerns gender-related security risks. In 2017, [Forbes](#) published a list of the 10 most dangerous destinations in the world for women traveling alone, 6 of which were in Latin America and the Caribbean. A third factor is accessibility. A number of constraints need to be addressed in order to offer visitors with disabilities the same opportunities for tourism, including (i) staff with sufficient accessibility-related capabilities; (ii) accessible infrastructure and equipment; and (iii) internationally recognized accessibility standards (Amadeus, 2017).

- 2.16 **Informality is one of the main obstacles to improving social inclusion through tourism.** Although it is difficult to gauge the scale of the problem at the regional level, different national and subnational data indicates that the tourism labor market faces the same structural problem of informality as the overall economy of the region, for which the rate is 53% (ILO, 2018). In some cases, tourism informality may even be higher than the regional rate due to the ease of entry in the sector, even for individuals facing constraints in terms of financing, market knowledge, or training

(UNWTO, 2004, 2005, and 2006). For example, estimates from Brazil indicate that 57% of tourism jobs were informal in 2019, above the national rate of 41% ([IPEA](#); [IGBE](#)). In addition, informal employment in Brazil's tourism sector grew by 44% between 2016 and 2019, compared with just 2% in the case of formal employment. In Mexico, informality in the tourism sector stands at 58%, roughly the same as the national rate of 56% (ECLAC, 2021b). In the case of tourism microenterprises, however, the rate rises to 84% (ILO, 2014). Informality in the tourism sector imposes both economic and social costs. The ILO (2013) has shown a direct link between informality and poverty, as earnings are lower than in the formal economy and working conditions are less certain. The evidence indicates that informal, subsistence-driven tourism microenterprises generate 2.4 times fewer sales than formal ones (Benavente et al., 2021). Companies decide to formalize only if the cost-benefit ratio is positive. Costs include the duration and complexity of administrative procedures, while benefits include the levels of social security coverage (MINCOMERCIO, 2020; MINCETUR, 2017). Further evidence needs to be gathered regarding the determinants of tourism informality in the region (paragraph 5.10).

D. Challenge 4: Strengthen environmental and climate management in tourism

2.17 The tourism sector in Latin America and the Caribbean faces challenges in terms of ensuring environmental sustainability in destinations. According to the World Economic Forum's TTCI, in 2019 Latin America and the Caribbean ranked below the world average in the environmental sustainability category, which measures the stringency of environmental regulations in each country and their enforcement in the case of the tourism sector. Thus, while tourism can suffer the consequences of poor environmental management in other activities, the sector itself can also generate such impacts.

1. Environmental pressures and their impact on tourism

2.18 Urbanization, industrialization, and agricultural expansion are affecting the natural diversity and quality of tourist destinations in Latin America and the Caribbean. For example, marine ecosystems and freshwater bodies in the region are affected by diffuse pollution from the use of pesticides and fertilizers or by salinization produced by accelerated urbanization. Some 80% of wastewater discharged into the sea in the region is untreated, affecting water quality at beaches. The expansion of agricultural production accounts for 95% of the reduction in forest cover in Latin America; this leads to biodiversity loss, thereby diminishing attractiveness for tourism (Díaz and Rosenberg, 2018; United Nations Food and Agriculture Organization, 2020). Natural World Heritage Sites face various types of anthropogenic and climate pressures that jeopardize their attractiveness to tourists. In 67% of these sites, protection and management are assessed as being "of concern" (Osipova et al., 2020).

2.19 Tourism in Latin America and the Caribbean is also vulnerable to disasters. These phenomena can lead to loss of life and damage to infrastructure, while also reducing a destination's attractiveness to potential visitors. For example, the Puyehue volcanic eruption in Chile in 2011 affected Argentina's lake-based tourist circuit, leading to US\$155 million in losses to the Argentine economy in the first three months after the disaster, with an additional US\$168 million in lost annual tourism-related tax revenue (IDB, 2017).

2. Tourism as a source of environmental impacts

- 2.20 **Poor tourism planning and management can have a significant adverse impact on destinations** (Pickering and Hill, 2007; Buckley, 2011 and 2012). Several studies have pointed to limitations in tourism governance and the associated absence of comprehensive regional planning as the cause of a series of adverse environmental effects from coastal tourism development in Mexico, Central America, and the Caribbean. These effects have included haphazard land use and planning patterns, the destruction of mangrove forests and wetlands, water pollution, ground movements, and the loss of hills, woodlands, and coastal dunes (Flores-Mejía et al., 2010; Padilla, 2015; Pérez-Maqueo et al., 2017). The lack of tourism planning is a widespread challenge in Latin America and the Caribbean, as evidenced by the example of Colombia, where 40% of tourism-oriented municipios lack planning processes to protect the environment (MINCOMERCIO, 2020). The failure to manage cruise ships correctly can also have negative impacts on the coastal and marine environment through physical damage to aquatic habitats from ships' hulls, the use of polluting paints, improper disposal of waste materials and wastewater, diesel spills from routine activities or accidents, noise emissions, and other factors (Anderson, 2020). Both tangible and intangible cultural heritage can also be negatively affected by tourism, through a loss of authenticity, resource deterioration, and spatial reorganization with a loss of the features of pre-existing communities, among other things (Larson and Poudyal, 2012; Pereiro, 2016; Cañada, 2019).
- 2.21 **The rapid growth of tourism in some destinations is leading to intense local resource consumption, as well rising output of solid waste and wastewater.** In destinations such as Cancún (Mexico) and Roatán (Honduras), fish stocks have declined due to intensive fishing aimed at meeting demand from the tourism sector (Padilla, 2015; Doiron and Weissenberger, 2014). In the Dominican Republic, it is estimated that tourism activities account for 40% of waste generated and 43% of energy demand, with visitors also using three times more water than Dominican residents (United Nations, 2019). Such indicators can lead to the rejection of tourism development by local communities (tourism-phobia), particularly in mass tourism destinations, as the communities' needs conflict with those of visitors (Sequera, 2020; Cañada 2019).
- 2.22 **Tourism can have a negative impact on protected areas in the region.** Protected areas are important tourist attractions for the region, but many have no management plans in place, representing a challenge for their sustainable management (UNEP, 2016). As a result, the impact of tourist activity on biodiversity can be seen in some protected areas. An evaluation conducted by Barros et al. (2015) based on metadata from 47 studies, concerning the impact of visitors on Andean natural areas in five South American countries, showed that a proliferation of informal trails has caused a reduction in biodiversity. The interrelationships between tourism and the environment mean that coordination between the respective authorities must be strengthened if the environmental management of tourist spaces is to be sustainable.
- ## **3. Tourism as a sector that is sensitive to the effects of climate change**
- 2.23 **Climate change adaptation and mitigation measures are critical for the resilience and sustainability of tourism destinations.** The United Nations Framework Convention on Climate Change (UNFCCC) points to climate change as

one of the major challenges of our time, and it is therefore urgent that tourism should both adapt to this development and at the same time become part of the solution.

- 2.24 **Climate change is affecting the attractiveness of tourist destinations in Latin America and the Caribbean.** Climate change is leading to ocean acidification, coral reef bleaching, and a loss of biodiversity and environmental services, as well as greater water scarcity, increased fire risk, and the spread of tropical diseases, among other things (Arabadzhyan et al., 2020). The intensity and frequency of extreme meteorological events is also increasing, leaving the region's tourism sector exposed to hurricanes, tropical storms, and surges and tides that have multiple economic, social, and environmental consequences (ECLAC, 2015). The main consequences of climate change for tourism are a loss of destination appeal due to increased risks to visitors, impacts on infrastructure, and challenges to the viability of tourism businesses, including insurance costs and the risk that tourism assets will be rendered worthless (IMF, 2016; Caldecott, et al., 2016). A global analysis of the exposure of tourism to the risks of climate change, covering 181 countries, places the Latin American and Caribbean countries in the medium to very high risk range, with the Caribbean facing the highest level of risk. The non-island countries that are characterized by both a heavy reliance on tourism and the highest levels of climate risk are Costa Rica, Belize, Honduras, and Mexico (Scott et al., 2018).
- 2.25 **Specific examples of the consequences of climate change for the Latin American and Caribbean tourism sector vary widely.** In the case of the hurricanes that occurred in the Caribbean in August and September 2017, for example, WTTC models estimate probable losses of US\$741 million in tourism expenditure, which would have added US\$292.5 million to GDP. Meanwhile, rising ocean temperatures have led to large volumes of sargassum algae in coastal areas of Mexico and the Caribbean, with negative effects on tourist arrivals, operating costs in the sector (due to the need to clean beaches), and the health of residents and marine ecosystems (Chávez et al., 2020; Clifford et al., 2017). Moreover, the 2019 Special Report on the Ocean and Cryosphere in a Changing Climate, produced by the Intergovernmental Panel on Climate Change (IPCC), confirms that global sea levels rose by 3.6 mm per year between 2006 and 2015. Loss of the beach resource is therefore already occurring in the region (Scott et al, 2012b; ECLAC, 2015c). Lastly, in the island destination of [San Blas](#) on Panama's Caribbean coast, increasingly frequent flooding has led residents of Gardi Sugdub to design a program of voluntary relocation to the mainland.

4. The sector is also a net contributor to climate change

- 2.26 **To avoid the worst effects of climate change, the tourism sector needs to reduce emissions.** The IPCC's Fifth Assessment Report warns of the incompatibility between emissions from the sector and the mitigation steps needed to achieve the 2°C limit established in the Paris Agreement. A study conducted in 160 countries indicates that the carbon footprint of the tourism sector represented approximately 8% of global greenhouse gas emissions from 2009 to 2013, four times higher than previous estimates (Lenzen et al., 2018). Transportation is one of the main contributors to tourism emissions: flights account for 40%, vehicle journeys for 32%, and accommodation for 21% (Scott et al., 2018). A model developed by the World Tourism Organization (UNWTO, 2019) to measure transport-related emissions from tourism estimates that these increased by 62% between 2005 and 2016. Tourism cannot be considered sustainable unless it makes progress towards

decarbonization, a goal that will demand a completely new way of planning and managing the sector. The visibility of tourism needs to be increased in the Nationally Determined Contributions submitted under the Paris Agreement. As of 2019, only 8 of 33 Latin American and Caribbean countries had included adaptation measures for the tourism sector in their Nationally Determined Contributions, while just 2 had included mitigation measures for the sector (European Commission, 2020; Bárcena et al., 2020). The interrelationships between tourism and climate change necessitate the strengthening of regional tourism governance so that climate management is streamlined within tourism management.

E. Challenge 5: Improve tourism governance in Latin America and the Caribbean

- 2.27 **Governance in the tourism sector is particularly challenging.** It involves coordination between three sets of stakeholders, each with different roles: (i) the private sector companies that provide tourist services; (ii) the public authorities that seek to preserve tourism-related public goods while internalizing their costs and creating an appropriate business environment for investment; and (iii) the local communities that accrue benefits from tourism but also absorb its costs (UNWTO, 2008). Several characteristics of these three sets of stakeholders make governance challenging. First, the private tourism sector consists of a wide array of economic activities (lodging, food, leisure, culture, transportation, commerce, etc.), and this, combined with the preponderance of MSMEs, creates enormous fragmentation. Second, the tourism authorities have to coordinate tourism activity across different levels of government that must coexist: local (or the destination), regional, national, and, occasionally, transnational. In addition, the tourism authorities must also coordinate with other State sectors and actors that are needed to carry out tourism activities, such as infrastructure, security, environment, and migration. Last, community participation is essential for aligning tourism with local needs. In tourism consumption, visitors are the ones that travel to the location of service delivery, coming into direct contact not only with tourism enterprises but also the local population, and this can have a disruptive impact.
- 2.28 **To deal with this complexity, tourism governance must establish shared objectives and formal channels for participation.** Conflicts are common between stakeholders with opposing interests. Examples of this are the grievances of the hotel industry against lodging platforms such as Airbnb, the conflicts between local communities and tourism developers resulting from changes in land use (due, for example, to rising house prices or the disappearance of existing economic activities), and the competition that arises between residents and visitors over the use of public goods in congested destinations. It is therefore essential to formalize tourism governance models that can drive common objectives forward, pursue balance between economic growth and socioenvironmental sustainability, build consensus, and transparently manage the tradeoffs that inevitably have to be made with tourism development (IDB, 2019c; Hampton, 2005; Jeonglyeol et al., 2010; OECD, 2016).
- 2.29 **Tourism governance is weak in Latin America and the Caribbean.** Sector governance is generally characterized not only by a lack of budget resources, but also limitations in the technical capabilities of national and subnational tourism institutions for planning, implementing, and evaluating policies and programs (OECD, 2017; MINCOMERCIO, 2018; Rodriguez, 2015). Public sector spending per international tourist in Latin America and the Caribbean (US\$44) is below the world

average (US\$65). Given the positive [causal](#) relationship between the level of public sector outlays and expenditure per tourist (a 1% increase in public spending boosts visitor expenditure by 0.27%), low public spending perpetuates an equilibrium with negligible growth. Low levels of tourism expenditure lead, in turn, to lower benefits to the economy.

- 2.30 The rest of this section discusses the challenges faced by the region's tourism authorities in their primary function of providing sector leadership and coordinating the activities of the other stakeholders that make up the tourism ecosystem: tourism enterprises, local communities, and the authorities in other sectors. It completes this with a discussion of the challenges posed by technology for regional tourism governance.

1. Relations between the tourism authorities and the private sector

- 2.31 **Public-private coordination in the region's tourism sector is weak.** One example of this is the Province of Misiones (Argentina), where two thirds of tourism enterprises lack any kind of relationship with the public tourism sector. This lack of communication gives rise to significant gaps in policy preferences for developing the sector: while the tourism authorities prioritize public investment (infrastructure, training, planning, market information), the private sector puts priority on reducing business costs (taxes, social contributions, and the costs of capital and production inputs). This information on policy preferences was combined with a computable general equilibrium model for the economy of the Province of Misiones. The results indicated that public infrastructure investment had the greatest positive impact on levels of private investment, highlighting the importance of intensifying the public sector dialogue with private sector stakeholders so that priorities can be aligned. This case study offers an objective methodology for eliminating gaps between the public and private sectors, an issue that also exists in other Latin American and Caribbean destinations (paragraph 5.10).
- 2.32 **The region relies excessively on fiscal incentives for stimulating private tourism investment and does not place enough emphasis on strengthening other determinants.** To stimulate foreign direct investment (FDI) in the tourism sector, many countries in Latin America and the Caribbean have developed a variety of tax exemptions that last for long periods, sparking fiscal competition with each other (IMF, 2008; Nassar, 2008). Despite this, a comparison of the incidence of fiscal incentives for tourism in Nicaragua (high) and Costa Rica (low) found little difference in the levels of investment achieved (Lanuza Díaz, 2014). A cost-benefit analysis of tax incentives for tourism in the Dominican Republic concluded that the incentives had shown limited impact and that their costs had exceeded their benefits (CIAT/UN-DESA, 2018). In addition, the IMF (2020) has indicated that governments in the region often use discretion in negotiating incentives; this may lead to discriminatory treatment and attract international scrutiny due to potential tax avoidance and lack of transparency. Various studies indicate that other determinants have a greater influence on FDI in the sector, such as the size and prospects of the tourism market, regulatory quality, legal stability, infrastructure, political stability, and the assistance provided to investors under public policies and programs to promote FDI (ICEFI, 2008; Wells et al., 2001; OECD, 2008; World Bank, 2013; Snyman et al., 2009; Daryaei et al., 2012; Falk, 2016; World Bank, 2018; ECLAC and Oxfam, 2019). Given that total private tourism investment in the region has contracted by -

14% since 2014 to US\$58 billion in 2019 ([Figure 18](#)), there is an urgent need to address these other determinants.

- 2.33 **The region needs to expand and strengthen the public-private partnership (PPP) model in order to improve the volume and quality of tourist infrastructure and amenities.** Evaluations of PPPs in Latin America and the Caribbean in the areas of ports and airports (critical tourism infrastructure), as well as tourism concessions in protected areas, have found that this model faces a number of challenges, including: (i) pervasive cost overruns, together with under or overestimation of demand trends; (ii) insufficient evaluation, with excessive risk allocation to a public sector facing fiscal deficits; (iii) frequent renegotiations, affecting the required investments; (iv) insufficient technical monitoring resources; (v) limited public dissemination of information on the performance of airport and port PPPs in the region; and (vi) low environmental sustainability (IDB, 2020d and 2020e; IMF, 2019; Oliveros et al., 2018).

2. Relations between the tourism authorities and local communities

- 2.34 **Local participation in tourism development is insufficient.** For example, there have been frequent examples of gentrification in historic cities in Latin America, relating either directly or indirectly to tourism development (Janoschka et al., 2013; Hiernaux and González, 2014; Díaz, 2015; Leyva, 2015; Rojo, 2016; Mathus, 2017; Cabrera-Jara, 2019). In an attempt to enhance heritage assets, local governments implement rehabilitation strategies involving real estate investments, yet these introduce tensions into the housing market and displace the original inhabitants. An example of inadequate local community participation occurred in the Pelourinho neighborhood of Salvador de Bahia (Brazil), where rehabilitation of the historic center resulted in a 67% reduction in the resident population, with Afro-descendants accounting for a high share of this (Mogensen, 2000). There have also been examples of a lack of local participation in tourism developments on the Pacific coast of Central America, where local populations have been displaced and conflicts have arisen over land and access to public goods such as beaches or water use (Rudolf, 2014; Cañada, 2011 and 2019). The lack of local community participation in decisions relating to cruise tourism can give part of the population the perception of social exclusion, as in Cozumel, Mexico (González et al., 2017). Likewise, the exploitation of intangible heritage for tourism purposes counter to the expectations of local communities has led to the trivialization and loss of local heritage (Andreu-Boussut et al., 2018; Oehchimen et al., 2019). In addition, the lack of local participation can exacerbate the social costs of an increase in crime associated with the presence of tourists, an increase in transactional sex, and heavy consumption of alcohol and other substances (Padilla et al., 2010; Hawke et al., 2016; Naverrete et al., 2020). Chief among crimes are human trafficking and exploitation, which often occur under the cover of anonymity afforded by tourist travel. One study notes that in Latin America, most abusers that travel to tourist destinations do not do so with the intention of committing a crime, but engage in crime upon their arrival because of easy access and low prosecution rates (ECPAT International, 2016). It has also become apparent that temporary workers and migrants are vulnerable, facing abusive situations with excessive working hours, unjustifiable delays or reductions in pay, verbal abuse, and lack of transparency during recruitment and hiring. This has raised concerns over the existence of human trafficking for the purpose of forced labor in the sector, but the data necessary to assess the scale of the problem are lacking (Hunter et al., 2012). Global estimates indicate that 10% of forced labor

occurs at establishments in the hospitality sector (ILO and Walk Free Foundation, 2017).

3. Relations between the tourism authorities and those in other sectors

- 2.35 **Interagency coordination between the tourism authorities and those in other sectors is minimal.** One example of this is coordination with the subnational level of government: in Peru, only 6 of the country's 24 regions are aligned with the policies proposed in the National Strategic Tourism Plan (Tourism Budget Program, 2016). At the supranational level, one of the obstacles to accelerating tourism integration is the lack of regional harmonization, which can be seen in tourism statistics, migration processes that allow tourists to cross land borders, criteria for assisting tourist consumers, and civil liability insurance requirements in the sector (IDB, 2010b and 2020c). The field of disaster management provides further evidence of weak coordination between the tourism authorities and other public actors. The IDB's Index of Governance and Public Policy in Disaster Risk Management (iGOPP) covers 26 countries in the region and evaluates whether regulatory, institutional, and budget frameworks are adequate to support effective policy implementation. One of the elements analyzed is the definition of sector responsibilities. The analysis indicates that tourism fulfills only 6% of the requirements for determining these responsibilities, obtaining a significantly lower score than the average for the other 10 sectors analyzed (24%).

4. New technologies and tourism governance

- 2.36 **ICT consolidation has given rise to new business opportunities, but also challenges for tourism governance in Latin America and the Caribbean.** On one hand, digital technologies offer new opportunities for households to generate income. For example, the average annual income of Airbnb hosts in Mexico City is above the national average (Instituto Mexicano para la Competitividad, 2019). On the other hand, digital platforms have created new competitive and spatial relationships in destinations, representing a significant disruption to traditional frameworks for tourism governance. A study carried out in Belize, for example, identifies a strong spatial correlation between the supply of Airbnb properties and a negative impact on earnings. When disaggregated by quintile, the analysis indicates that Airbnb tends to compete directly with the most economical hotels—in other words, the most vulnerable (Central Bank of Belize, 2018). Meanwhile, an evaluation of the supply of platform-based tourism accommodation in Mexico City and São Paulo has revealed spatial patterns of gentrification and social segregation similar to the dynamics experienced in certain European and North American cities. In addition to placing pressure on the residential rental market, accommodation offered through the platforms tends to be concentrated in specific neighborhoods, leaving out the most vulnerable groups and deepening problems of segregation (López-Gay et al., 2019). Current regulations in the region do not adequately address the new spatial and competitive effects of digital tourism activity, and a review of existing regulations and coordination channels is therefore required (IDB, 2021b).

III. INTERNATIONAL EVIDENCE REGARDING THE EFFECTIVENESS OF TOURISM SECTOR POLICIES AND PROGRAMS

- 3.1 This section presents a review of the international literature regarding the effectiveness of different policies that affect the performance of the tourism sector. The chapter is divided into five sections that discuss the policies that can be implemented in response to each of the challenges analyzed above. It should be noted that although these policies are generally applicable, they must be adapted to the specific context of each country.
- A. Policies to strengthen recovery of the tourism sector in the wake of the COVID-19 shock**
- 1. Supply-side support for the tourism sector**
- 3.2 **Public sector support measures have been critical for mitigating the impact of COVID-19 on tourism in the short term** (Assaf and Scuderi, 2020; Anestis et al., 2020). Initially, to ensure the survival of businesses and workers in all sectors, including tourism, three major types of support were provided by countries around the world (OECD, 2020a; UNWTO, 2020; ECLAC, 2020; IDB, 2020a and 2020b): (i) support to guarantee liquidity for business, for example through soft loans, public guarantees, loan payment suspensions and postponements, and the reduction or elimination of taxes and preliminary tax payments; (ii) support to protect workers, through subsidies for businesses to maintain employment, wage compensation for unemployed workers or those on reduced hours, and the postponement or reimbursement of social security contributions; and (iii) support to protect the most vulnerable households, through basic incomes, medical coverage, and the deferral of mortgage payments and payments for basic supplies. Other measures more targeted to the tourism sector have involved rescues for large anchor companies (such as airlines), legislation to support travel rebooking instead of refunds, and the redeployment of tourist amenities as health facilities, which has given tourism businesses the chance to continue operating. Although all of these actions are thought to have helped stave off a wave of dismissals, bankruptcies, and mortgage foreclosures, the scale of their impact on company balance sheets is not yet fully known.
- 3.3 **Some countries have introduced measures aimed specifically at assisting informal workers.** The UNWTO (2020) has warned of the vulnerable situation of informal workers who are unable to access the assistance described above. As a consequence, there are cases in the region of specific supports being implemented for these groups (e.g., [Chile's emergency voucher](#) or the [independence payment](#) in Peru), though these lack sector focus. It is important that these instruments be used to improve knowledge of the informal sector so that programs to support formalization can be better targeted in future (ECLAC, 2021c).
- 3.4 **Though no national evaluations have yet been carried out of the relative effectiveness of the different measures to support the tourism product, this type of work will be essential for application of the relevant lessons learned** (OECD, 2020b) (paragraph 5.10). An analysis was performed of stimulus packages in 24 economies that included almost US\$100 billion in direct funding for the tourism sector and around US\$300 billion for a variety of sectors, including tourism. This analysis concluded the following: (i) few countries had identified the main beneficiaries and losers from the assistance packages, highlighting the urgent need

for evaluations; and (ii) two thirds of tourism enterprises were unaware of the assistance available or felt that it was insufficient, meaning that not all needs have been met (Constantin et al., 2020).

2. Demand-side stimulus

3.5 Countries are focusing on demand segments that offer greater prospects for recovery in the short and medium terms. To this end, disposable income, epidemiological developments, and traveler confidence levels all need to be considered (Eugenio-Martin et al., 2020). These segments include the following:

- a. Domestic visitors. These visitors are more aware of the local context and are being targeted by initiatives such as changes to the dates of public holidays (as in the case of Costa Rica), the creation of domestic tourism observatories (Argentina), travel vouchers with discounts, and marketing campaigns (Tourism Research Australia, 2020). In destinations where domestic tourism is less significant, such as the Caribbean, the focus is on short-haul flows (paragraph 2.10a).
- b. Digital nomads: These travelers relocate with the aim of working remotely, encouraged by the pandemic-driven process of digitalization. In the United States, one of the main source markets for the Caribbean and Mexico, the number of digital nomads has grown by 49% in the space of year, reaching 11 million people in 2020 (MBO Partners, 2020). This has spurred various countries in Latin America and the Caribbean to offer special visas for this visitor category, including Barbados, Mexico, Costa Rica, Panama, Colombia, and Ecuador.
- c. Younger, less risk-averse travelers, such as Generation Z or Millennials. This group seeks personalized, digitally connected experiences. A survey by the University of Florida confirms that under-25s are less apprehensive about traveling than other, older segments (Pennington-Gray, 2020).

3.6 Health safety is currently one of the main factors influencing market recovery. The fear of infection and having to quarantine is one of the factors driving demand-side behavior (IDB, 2021). As a result, different public and private stakeholders in the tourism sector are involved in implementing biosecurity protocols to address the risk of COVID-19 infection, both nationally and at the international level (e.g., the WTTC, with its [Safe Travels](#) Stamp). The IDB (2021) has completed an evaluation of the suitability of tourism biosecurity protocols in force in various regions of the world, concluding that in order to be effective, protocols must: (i) be permanently updated based on the latest scientific evidence regarding channels of transmission; (ii) take into account the fact that infection risk is not static but varies based on modulating factors (ventilation, relative humidity, safety distances, type of mask, duration of exposure); and (iii) establish mechanisms to monitor the effectiveness of the protocols.

3.7 Work on tools to facilitate and promote tourist travel is taking place on various fronts. The [European Commission](#), for example, has created a digital certificate that serves as proof of a traveler's vaccination and test status. Meanwhile, the International Air Transport Association is working on the [Travel Pass](#), an application that helps passengers to store, manage, and verify their COVID-19 health certificates. Although this type of technology may accelerate coordination between different countries and administrations by allowing interoperability of solutions, it

faces risks in areas such as data protection, cyber attacks, and potential discrimination against unvaccinated travelers (Gstrein et al., 2021). As in the case of policies to support the tourism product during COVID-19, policies to stimulate demand should be subjected to empirical evaluation so that future actions can be designed in the most cost-effective manner possible (paragraph 5.10).

- 3.8 **Sector authorities are also assessing the medium- and long-term implications of the crisis in the sector.** In this respect, there are two major priorities: (i) the COVID-19 crisis may serve as an opportunity to promote structural transformations that create a more profitable, sustainable, and resilient tourism economy, thus addressing the structural challenges that existed before the pandemic; and (ii) COVID-19 has served as a warning of the need to improve integrated crisis management in the sector, allowing future crises to be tackled more effectively. There are several examples of tourism recovery initiatives that address both of these pillars (the concept of “building back better” and improving crisis management in tourism). In [New Zealand](#) and [Barbados](#), the tourism authorities have undertaken consultation processes aimed at promoting tourism in the post-COVID-19 context, while the [United Kingdom](#), [Spain](#), and other countries have launched recovery plans that encompass both concepts. To integrate the concept of building back better into the process of sector recovery, it is important to consider the types of policies described below in this SFD, which relate to the challenges of economic returns and socioenvironmental sustainability.

B. Policies to increase tourism’s economic benefits and contribution to the local economy

1. Policies to increase the economic benefits of tourism

- 3.9 **The generation of economic benefits from tourism depends on total tourism expenditure received by the destination.** Tourism expenditure is the product of the number of arrivals, the duration of the visit/number of nights stayed, and daily spending per visitor (Gössling et al., 2018). Tourism expenditure triggers the generation of economic benefits from tourism in the destination, mainly through income and employment. The literature identifies two types of factors that influence travel decisions, the choice of destination, and the structure of tourism expenditure (Crompton et al., 1997; Crouch, G. I. et al., 2004; Correia, A. et al., 2004; Kaseean, H. et al., 2013): (i) “pull” factors, which relate to conditions in the destination (e.g., tourist appeal, ease of access, safety) and (ii) “push” factors, which relate to demand conditions (e.g., disposable income and sociodemographic or psychographic variables). Different regional and international econometric studies confirm the importance of both factors for driving tourist arrivals and expenditure (Pivčević et al., 2016; Nicolau et al., 2004).
- 3.10 **Knowledge and proactive management of these factors through the use of robust intelligence systems and effective market segmentation is critical** for achieving a diversified demand portfolio that: (i) maximizes tourism-related income and foreign exchange earnings; (ii) reduce destinations’ vulnerability by lessening their dependence on a small number of markets; and (iii) optimizes, expands, and concentrates the use of tourism resources and amenities, leveraging complementarities between different types of visitors. Evidence is provided below regarding the pull and push factors that need to be addressed as part of destination management in order to maximize tourism expenditure.

(i) **Examples of pull factors that warrant action**

- 3.11 **Investments to preserve local heritage for tourism purposes are effective for boosting arrivals and increasing tourism expenditure.** For example, interventions in Argentina to develop two Jesuit Missions as tourist attractions—financed under the Program to Enhance Tourism Sector Competitiveness—yielded an ex post economic return of 29% due to increased tourism expenditure (IDB, 2012b). Another example is provided by an ex post analysis of a heritage regeneration project in the Colonial City of Santo Domingo, which demonstrated tourism-related benefits in excess of US\$25 million, as well as the creation of more than 400 new jobs (Banerjee et al., 2018). Meanwhile, several experiences in both developed and developing countries highlight the ability of tourism to restore industrial heritage (e.g., sugar mills and other archaeological industrial resources) while generating fresh sources of income (Vargas-Sanchez, A., 2015). With respect to intangible heritage, there have been successful examples of creative tourism that have produced distinctive experiences and boosted tourism expenditure (OECD, 2014; Camejo, 2020). The importance of investments in heritage regeneration is confirmed by the potentially negative impact on visitor arrivals if the declaration of a World Heritage Site is not accompanied by such investments, due to the high expectations created (Cuccia et al., 2016).
- 3.12 **The development of regional public goods can also serve as an important building block for regional tourism integration.** In the European Union, ex post evaluations of territorial cooperation initiatives (INTERREG II and III, implemented between 1994 and 2006) found that cross-border projects to develop and improve joint tourism products were more effective in driving integration than other economic sectors (LRDP Ltd., 2003; Panteia and Partners, 2010).
- 3.13 **Investment in connectivity infrastructure and services also influences the number of tourist arrivals to a destination.** In the case of Latin America and the Caribbean, Eugenio-Martín et al. (2004) found that the development of physical infrastructure in destinations is one of the most significant factors explaining international arrivals to the region. Another study found that number of flights is the most effective element for increasing tourist arrivals in the Caribbean (Acevedo et al., 2016). In the case of the Kuélap Archaeological Complex in Peru, which included the first public gondola system in the country and the renovation of Jaén airport, an analysis demonstrated a positive causal effect between these investments and a 100% increase in tourist arrivals (Banco Central de Reserva del Perú, 2019). The links between infrastructure and tourist arrivals have also been shown in other international destinations (Tang and Rochananond, 1990, in Thailand; Kim et al., 2000, in South Africa; Seetanah et al., 2011, in Mauritius; Doerr et al., 2019, in Germany).
- 3.14 **Proactive security management in destinations is crucial for attracting and retaining visitors.** Market segmentation is a key tool for effectively managing security perceptions on the demand side. Flores et al. (2016) indicate that not all demand segments react with the same intensity in the face of possible security risks in destinations. The authors compared potential travelers from the United Kingdom and the United States, finding that 9 in every 10 British visitors disregarded the travel advisories issued by their country, while 66% of those from the United States took them into consideration. This reinforces the importance of having an accurate understanding of the source market in order to facilitate effective segmentation. At

the same time, it is important to combine knowledge of the market with actions coordinated with the security authorities in the destination. This can be achieved, for example, through surveillance systems based on new technologies (drones, adaptive lighting, etc.) (IDB, 2017b) or specific tourist safety initiatives such as the Tourist Assistance and Protection Service in the Dominican Republic, the Tourist Protection and Assistance Program in Mexico (which includes the Green Angels service), and the Tourist Protection Network in Peru, among others. Evaluation mechanisms should be implemented for these types of initiatives to assess their effectiveness and impact on perceptions of destination safety. A 2013 [evaluation](#) of the Green Angels initiative points to the need to strengthen definition of the target population and its assistance needs. Additionally, Papathanassis (2016) concludes from an analysis of comments on Tripadvisor about vacation stays that specific local support for tourists who are victims and reliable official points of contact (e.g., tourism police or a hotline for tourism-related legal assistance) could significantly reduce the negative reputational impact of the corruption targeting tourists.

- 3.15 **Enhancing the destination image through investment in tourism marketing has a favorable impact on tourist arrivals and expenditure** (Nicolau et al., 2004; Naudé and Saayman, 2005; Lim, 2006; Song et al., 2010; Balli et al., 2015). In Australia, for example, different evaluations of public investment in international tourism marketing found an average return of per dollar invested of 15:1 (Insignia Marketing Research, 2014; Webber Quantitative Consulting, 2014). Some authors warn of the need to understand the marketing elasticity of different markets in order to maximize the impact of promotion activities (Kulendran et al., 2009; Dwyer et al., 2014).
- 3.16 **With brand mistrust increasing, user-generated digital content is being used as a source of travel information** (Phocuswright, 2017). As a result, social networks are one of the main digital channels to be considered in tourism communication activities, as they influence not only the visibility of destinations but also their performance: more reviews and higher ratings on TripAdvisor boost tourist demand and increase overnight stays and tourism expenditure. TripAdvisor (2018) estimates that it influenced 11% of tourism expenditure in Latin America and the Caribbean in 2017.

(ii) Examples of push factors that should be understood and integrated into tourism management

- 3.17 **Travel decisions are affected by socioeconomic conditions in outbound markets.** Romeu and Wolfe (2011) measured the impact of changes in economic conditions in OECD source countries on tourist arrivals in Latin America and the Caribbean, finding that a 1% average increase in unemployment rates in those markets reduces Caribbean tourist arrivals by between 3% and 5%. Likewise, Guzmán-Soria et al. (2011) found that economic growth in the United States and Canada has a significant positive effect on the development of Mexico's tourism sector. Agiomirgianakis et al. (2017) analyzed short- and long-term demand functions for Singapore in the 2005-2014 period, finding that exchange rates and socioeconomic conditions in outbound markets affect travel decisions over a very specific time period, during which actions to capture demand (e.g., marketing) must be implemented in order to maximize their effectiveness. For example, changes in disposable income have maximum impact between four and six months

prior to a trip, while the impact of exchange rate volatility is felt between 10 and 12 months prior.

- 3.18 **It is important to take into account not only actual demand (visitors arriving in the destination) but also potential markets.** Eugenio-Martin et al. (2020b) demonstrate the existence of latent tourism demand using an econometric model of 28 European countries, for origin-destination pairs and by type of tourism. This is significant, given that an understanding of potential demand facilitates the capture, where necessary, of new demand segments with higher propensity to spend, or with timing and spatial behaviors that are more favorable for the destination than current segments (ECLAC, 2020c).
- 3.19 **It is important to stimulate both international and domestic demand.** Sala et al. (2014) confirm the differing performance of these markets in Spain in the face of shifts in economic cycles during the 1990-2011 period. The study shows that inbound tourism has a marked carryover effect on economic activity in the country, but that domestic tourism has a relatively greater capacity to moderate losses in times of recession. Amaral et al. (2013), in a study of tourism demand in Brazil, warn that although domestic tourism can be understood as a zero-sum game (in terms of foreign exchange from inbound tourism), it plays an important role in redistributing national income.
- 3.20 **The strategies used to compete in the market are influenced by differing price elasticities on the part of different demand segments.** A study for 16 Caribbean countries found that the price elasticity of tourist arrivals to Caribbean locations positioned as luxury destinations is very low and has low statistical significance (Laframboise et al., 2014). In this case, the strategy for attracting demand focuses on the quality of amenities and tourist services rather than prices. The experience of Calviá, a mature destination in Spain's Balearic Islands, shows that strategic investments in destination quality can improve market position and attract new segments with lower price elasticity. Faced with problems of obsolescence in its tourism product, the government supported investments to improve hotel infrastructure and the natural and urban environment, leading to a subsequent increase of 3% in average tourist prices, as well as high occupancy rates (Aguiló et al., 2002).
- 3.21 **Some outbound markets have a higher propensity towards seasonal spending than others.** Accordingly, it is important to attract complementary demand segments by offering tourism activities and proposals that do not depend solely on the weather. Cultural festivals are a successful example of diversifying the stock of tourist attractions to capture demand in the low season (UNESCO, 2009; Tourism Industry Association New Zealand, 2014). In the Caribbean, different destinations have spent many years promoting this type of event, such as Cropover in Barbados, the St. Lucia Jazz Festival, or Carnival in Trinidad, among many others. Various studies underline the positive effects of these festivals on tourist arrivals and expenditure, hotel occupancy rates in low season, and the local economy (Nurse, 2003; Croes et al., 2016).

(iii) Examples of interventions to improve tourism productivity

- 3.22 **Flexible arrangements, improvements in working conditions, and training can all improve tourism productivity and benefit workers in the sector.** A study of 43 hotels in the United Kingdom analyzed productivity in relation to both external

conditions (demand variations) and internal conditions (human resource management). It found that employment practices that favor flexibility lead to productivity improvements of between 6% and 13%. Examples of labor flexibility in the tourism sector include increased or reduced working hours or transfers of workers between departments or roles in response to demand variations. These practices allow companies to retain qualified workers and reduce costs when demand is low (Park, S. et al., 2016). Flexibility should be accompanied by employee retention programs involving training and the development of opportunities for career advancement, among other measures, with the aim of ensuring decent, nonprecarious employment (ILO, 2017b; Yoo Ri Kim et al., 2019). In this sense, the OECD (2020c) emphasizes the importance for productivity and working conditions of improving professional skills through formal tourism education and training programs. Further evidence needs to be gathered regarding the determinants of tourism productivity in Latin America and the Caribbean, as well as policies to improve it (paragraph 5.10).

- 3.23 **Digitalization has the potential to drive innovation and productivity in MSMEs in the sector.** Research conducted in Australia shows that digitalization can increase the earnings of small enterprises by 27% (Australia and New Zealand Banking Group Limited, 2018). Policy options for improving digitalization in tourism MSMEs include: (i) strengthening forecasting of the future skills needed in the sector, so as to provide reliable labor market information to education and training providers; and (ii) providing direct support for MSME digitalization through local digitalization networks that promote local communities of practice, the exchange of resources, technical and financial support, and workplace training (OECD, 2020d).

2. Policies to maximize the local contribution of the economic benefits of tourism

- 3.24 **Intelligent systems should include information on the structure of visitor expenditure.** Knowing what proportion of the tourist budget is spent and where has important implications for maximizing economic benefits at the local level, as it allows the highest-impact segments to be selected. This does not mean maximizing the number of arrivals in a way that leads to overcrowding, but rather optimizing expenditure per tourist and the associated multiplier effect (Sánchez et al., 2020). The strength of the economic effects of different demand segments (and therefore their multiplier effect in the local market) will depend on tax levels, import ratios, capital to labor ratios, and upstream and downstream economic linkages in each subsector where tourism expenditure occurs (Winters et al., 2013). A study in Hawaii, for example, found that the net daily economic benefits generated by visitors staying in hotels (US\$52) were higher than visitors staying in timeshares (US\$19), as the latter dedicate a higher proportion of their spending to activities with high import ratios (food, entertainment, and shopping) (Pratt, 2012). A separate analysis of the economy of the Galapagos Islands from 1999 to 2005 showed that the multiplier for spending by international tourists (0.218) was lower than that for nationals (0.429), as only 8% of international tourism expenditure occurred in the islands themselves (Taylor et al., 2006). Likewise, an ex ante economic evaluation of the Northeast Development Program-Tourism for Bahia, Brazil, found that production multipliers for tourists staying in the homes of friends or relations tend to be lower than for those staying in tourism establishments, and that domestic tourists generate more employment through their spending than international tourists (IDB, 2012).

- 3.25 **Local maximization of the economic benefits from tourism depends on linkages between the sector and local producers.** One example of this is Jamaica, where a Tourism Linkages Network (between tourism and manufacturing, agriculture, entertainment, and leisure) has been created based on a study that assessed annual leakage from imports of manufactured and agricultural goods for the tourism sector. The initiative has gradually borne fruit, including the Agro-Tourism Farmers' Market, which provides an improved business structure for more than 70 farmers (Ministry of Tourism and Entertainment of Jamaica, 2015). The Tourism Linkages Network was expanded in 2020 to build links between tourism and the sectors of gastronomy, health and wellness, sports, shopping, and knowledge. Another successful example from outside the region is the Green Supply Chains Project in the Slovenian capital city, which uses a centralized online system to link agriculture with tourism, generating new opportunities for local farmers. As of 2017, this project had already been rolled out to a further 25 municipios (UNWTO, 2018). However, further evidence needs to be gathered regarding the impact of this type of policy in the region (paragraph 5.10).

C. Policies to strengthen the distribution of the economic benefits of tourism to groups in vulnerable conditions

- 3.26 **Explicit policies need to be adopted to ensure that tourism provides benefits to social groups made vulnerable by factors such as income, gender, ethnicity, age, or disability.** Tourism represents an opportunity for inclusion for vulnerable groups, but the necessary conditions and incentives must be created for them to be effectively incorporated into the sector.

1. Policies for the social inclusion of vulnerable groups through tourism

- 3.27 **Employability training and the formalization of tourism employment can help to ensure that tourism provides benefits to the most vulnerable citizens.** Training is a prerequisite for meeting tourism sector labor needs, but in the case of the poorest families it is generally limited (Blake et al., 2008). Initiatives to promote formalization represent another key instrument for improving working conditions for the most vulnerable groups. In Peru, the Skills Improvement Plan certifies work-related skills acquired by informal workers through experience. The plan has proven a useful tool for improving professional qualifications, and its use is gradually being expanded (UNWTO, 2019b). Also in Peru, an analysis of the causal effects of the Tourism Act on labor informality among tourism sector workers concludes that the legislation has created incentives for dependent employees to formalize, particularly in the case of women (Del Pozo, 2018). The ILO (2017) has also emphasized the need to enforce existing legislation in order to promote decent working conditions in the sector (contracts, wages, and social protection).

- 3.28 **Another avenue for inclusion is the direct delivery of tourism services to visitors by local entrepreneurs.** An evaluation by Schilling et al. (2014) of farm profitability in the state of New Jersey (United States) concluded that farms involved in agritourism activities generated higher net income than those that did not offer this activity. Another example of local entrepreneurship is community tourism, organized by campesino families and indigenous communities. There have been examples of failures in this segment due to a lack of commercial viability, but there have also been successes. Some of the latter have been self-financed and oriented toward the domestic market, while others have created intermediation structures that have allowed them to access the international market, managed either by the community

organizations themselves or in collaboration with tourism operators. The mixed outcomes from community tourism businesses have highlighted the importance of local ownership and adaptation to the different demand segments as determinants of success (Cañada, 2015). At the same time, many tourism enterprises operate in the informal sector, as in the case of employment. Training, formalization, and improvements in the quality of the most vulnerable tourism services can improve the profitability of informal enterprises, as demonstrated by an ex post evaluation of a program in The Gambia, which identified increased earnings of between 18% to 33% in the case of tourist guides, juice vendors on beaches, and artisans (Bah and Goodwin, 2003). A successful gastronomy tourism experience in Thailand has also demonstrated the potential of digital platforms to provide a rapid means of entry into the tourism market for local entrepreneurs, allowing them to generate additional income and reinforcing the authenticity of tourist visits (Kattiyapornpong et al., 2021). To meet demand-side expectations, it is essential to ensure that the most vulnerable entrepreneurs have digital capabilities and access to connectivity so as to facilitate their presence on the web, while also supporting the quality of their tourism services (OECD, 2020c).

- 3.29 **A third channel for social inclusion is supplying tourism enterprises, which reinforces linkages between local production and tourism.** However, supplying the tourism sector is a challenge for small, low-income producers, requiring them to produce large volumes, deal with an uneven flow of orders (due to the seasonal nature of the sector), achieve high quality standards, and deliver on time. In the case of Zanzibar, for example, Nguni (2015) found that value chain linkages were broken or very weak because small local suppliers are unable to meet the safety, health, and quality standards demanded by hotel chains. This highlights the importance of explicit action to strengthen linkages between tourism and local production chains, particularly with respect to smaller, less well-resourced producers. In 2016, the International Finance Corporation (IFC) carried out an evaluation to measure the economic impact of three of its hotel investments, in the Maldives, Mali, and Ghana. It found significant economic benefits in all three cases due to the design of the investments, which provided for the creation of linkages with local production from the very beginning.
- 3.30 **Crosscutting programs have been effective in enhancing the employment, entrepreneurship, and supply capabilities of vulnerable groups with respect to the tourism sector.** Such programs have been based on different types of support, such as: (i) improved access to sector information and knowledge, with professional training and long-term technical assistance (Bah and Goodwin, 2003; Jamieson, 2004; Kubsa, 2007; Verdugo, 2007; Weru, 2007; Armstrong, 2012; Compete Caribbean et al., 2019); (ii) access to capital, financing, and markets (Bah and Goodwin, 2003; UNWTO, 2005; Weru, 2007; Mtui, 2007; Mitchell and Ashley, 2008); (iii) strengthened property rights and legal support (UNWTO, 2004); (iv) business and employment formalization, through a combination of single windows, technical assistance tools, training, monitoring and adaptation of fiscal instruments that help to reduce the costs and duration of registration processes, simplification of tax systems, and access to social protection schemes (Bah and Goodwin, 2003; UNWTO, 2006; Garcia Lucchetti and Font, 2013; ILO/German Association for International Cooperation, 2014; MINCOMERCIO, 2019; Farfán, 2020); (v) support for the social responsibility initiatives of tourism companies, aimed at improving the quality of life of disadvantaged local communities in the destinations

(Cohan, 2009); and (vi) strengthened local linkages between businesses, communities, and local governments (Kessy et al., 2018). Nonetheless, evidence regarding the effects of each type of intervention is still emerging, and the different achievements need to be evaluated by type of beneficiary (paragraph 5.10).

2. Policies to promote tourism consumption by vulnerable groups

3.31 **Social tourism can facilitate access to tourism consumption on the part of groups who are disadvantaged due to age, income, or other factors.** Examples of this in Latin America and the Caribbean include the Trade Sector Social Service (SESC) in Brazil, the Family Benefit Fund of the Colombian National Traders' Federation (FENALCO), Argentina's Tourist Units Program, the Social Tourism System in Uruguay, and vacations for older adults, study tours, and family tourism in Chile (Schenkel, 2019). A study of the effects of a Spanish program aimed at older adults found that it has helped to maintain tourism activity and employment during the low season, thus improving profitability of tourism businesses (Cisneros-Martinez et al., 2017). Another study relating to older adults, this time in Portugal, found that the multiplier effects of expenditure during trips are higher than those incurred during program execution (Eusébio et al., 2016). Nonetheless, Diekmann et al. (2018) emphasize the need to strengthen the empirical evidence regarding these initiatives by type of beneficiary (paragraph 5.10).

3.32 **Accessible tourism in Latin America and the Caribbean varies in terms of its scope and approach.** In terms of regulation, countries in the region address accessible tourism either through their tourism laws or through disability legislation. Argentina's National Accessible Tourism Act is an exception to this, but its implementing regulations have not yet been issued. In addition to national regulations, those at the subnational level also need to be taken into account, adding complexity. Some countries have created specific entities or initiatives in this area. In Argentina, for example, the Program for Accessibility Guidelines for Tourism Services has been in place since 2010, while the Accessibility Program in Brazil has been a crosscutting policy of the Ministry of Tourism since 2012. The achievements of these different regulations and initiatives should be evaluated with a view to adjusting their design where necessary. In addition, Buhalis et al. (2012) point out that although there is a global consensus surrounding the need to promote accessible tourism, policies focus overwhelmingly on demand-side needs rather than business capabilities, recommending that the latter approach be strengthened (paragraph 5.10).

D. Policies to strengthen environmental and climate management in tourism

1. Policies to tackle the environmental pressure of economic activities on tourist destinations

3.33 **Official areas of tourist interest (ZOIT) can be useful for protecting the distinctive features of tourist areas.** The legal declaration of an area of tourist interest can help to preserve the environmental and cultural characteristics of a destination and protect it from external interventions that may reduce its tourist appeal. In Chile, [areas of tourist interest \(ZOIT\)](#) or public-private spatial management in tourist destinations. The results of the ZOIT have yet to be evaluated (paragraph 5.10). Such declarations must be also accompanied by the explicit inclusion of tourism in broader spatial plans, with a view to regulating compatible and permitted uses within a single area, promoting the orderly development of

economic activity, and minimizing possible negative impacts on areas of tourist interest (Universidad Externado de Colombia et al., 2019).

3.34 **Tourism earnings can support the financial sustainability of protected areas.**

The mechanisms used most frequently to fund protected areas through tourism are entry fees for visitors and concession contracts with tourism operators. Some State-owned parks manage to collect as much as 80% of their tourism revenue through direct entry fees alone, although this is relatively unusual (Buckley, 2011). In a number of countries in the region, improvements to the system for charging entry fees to visitors resulted in an increase in the share of revenue allocated to maintaining protected areas. In Honduras, revenue increased by 47%, while in Chile, Ecuador, and Argentina, it increased by 38%, 34%, and 30%, respectively (Bovarnick et al., 2010b). This mechanism needs to be strengthened further, as the fees charged are frequently lower than the willingness to pay. A study of the Osa Peninsula in Costa Rica, for example, found that 66% of tourists were prepared to pay an additional US\$177 (Center for Responsible Travel, 2011).

3.35 **Tourism provides opportunities to expand conservation areas and create new local economic opportunities.**

In Peru, it has been demonstrated that private ecotourism investments support the conservation of areas in the Amazon (Kirby et al., 2011; Global Green Growth Institute et al., 2015). In Latin America and the Caribbean, a review of 27 private community-based tourism projects revealed that 89% of these allocated a significant share of tourism-generated funds to conservation, demonstrating a strong determination on the part of the communities to protect their natural and cultural resources (Jones, 2008). In Costa Rica, two thirds of the contribution of protected areas to poverty reduction in neighboring areas is attributable to their use for tourism purposes (Ferraro and Hanaver, 2014). A study by the IDB and ILO (2020) indicates that ecotourism in Costa Rica has created jobs with higher wages and better opportunities for career advancement than other economic alternatives.

2. Policies to strengthen environmental management in tourism

3.36 **Planning, zoning, and impact evaluation measures are effective for avoiding and mitigating the effects of tourism developments.**

For example, land-use zoning strategies based on geographic information system maps, big data, and temporal analyses of changes in land use have been successful in controlling tourism-related urban expansion, avoiding negative environmental impacts (Hernández-Martíns et al., 2017; Samat and Harun, 2013). An evaluation of strategic planning, zoning, and impact monitoring initiatives in World Heritage Sites with tourist appeal concluded that sites with planning measures achieve better conservation outcomes than those lacking them (Hubert et al., 2017). Similarly, several authors underline the usefulness of dynamic spatial protection and management approaches as a means of responding to changing environments (Sutherland et al., 2004; Pullin and Knight, 2009; Howell et al., 2008; Hooker et al., 2011). Such approaches can be useful for reducing pressure on natural and urban destinations through physical and time restrictions on access (e.g., those recently implemented in [Machu Picchu](#)); dynamic pricing tools; enabling of transportation to less congested areas; modification of visitor behaviors through awareness-building and regulation; strengthening of real-time monitoring of tourist flows using new technologies; and timely, segmented management of social media (European Parliament, 2018; Generalitat Valenciana, 2019; OECD, 2020c).

- 3.37 **Environmental certification and social responsibility programs are useful as a complement to regulatory instruments.** Several studies have found that environmental certification in the tourism sector yields economic benefits. For example, an evaluation based on panel data from 141 Costa Rican beach communities found that the “Blue Flag” certification initiative for tourist beaches had a positive impact in terms of fostering new tourism investment, particularly in the hotel segment (Blackman et al., 2012). Carpacci et al. (2015) found similar results in a study comparing the appeal of Italian provinces with Blue Flag certification, suggesting that such certification positively influences the destination choices of foreign visitors. Another study by Walsman et al. (2014) indicates that hotels in the United States with Leadership in Energy and Environmental Design (LEED) certification are more successful than their competitors, with higher daily rates and earnings per room in the two-year period following certification. Nonetheless, evidence regarding the environmental benefits of certification initiatives is weak. Based on an analysis of five evaluations of the effectiveness of different certification instruments, Buckley (2011) concludes that environmental regulation is more effective than certification for supporting environmental sustainability in the tourism sector. Blackman et al. (2014) corroborate this argument, indicating that most evaluations focus on the socioeconomic effects of certification rather than its environmental impact. Moreover, the costs of membership, management, bureaucracy, and the time taken to achieve certification all hinder the development of these schemes (Dunk et al., 2016).
- 3.38 **The transition to circular economy models can improve tourism sustainability by prioritizing zero-emissions and zero-waste production processes.** Guides to good environmental practices in the hotel sector contain numerous examples of circular economy initiatives (Rodriguez et al., 2020; Zein et al., 2008; Ching et al., 2008; International Tourism Partnership, 2014; Sweting and Rosenfeld, 2003); these have focused essentially on resource consumption and solid waste production. In this regard, there is evidence from different geographical contexts of the positive impact of combining technologies to simultaneously resolve problems of access to potable water and power, on one hand, and poor management of solid waste and wastewater in tourist facilities, on the other (Arias-Hidalgo et al., 2019; European Commission, 2017). Meanwhile, the [Global Tourism Plastics Initiative](#) offers tourism organizations a series of recommendations for addressing plastics pollution in the sector and asks that they make a set of concrete and actionable commitments by 2025. These good practices yield benefits in terms of cost savings, enhanced reputation, and improvements in the environmental quality of the destination. Nonetheless, a study based on interviews with operators of hotel chains in the Scandinavian market found that the circular economy was seen by respondents as a framework for solid waste management, while the potential of the circular economy to regenerate social and natural capital was not perceived as a key objective (Einarsson et al., 2020). Accordingly, it will be essential to promote a comprehensive vision of the potential of the circular economy to drive sustainability in the tourism sector. The [Circular Economy Coalition for Latin America and the Caribbean](#) was launched in 2021 and may provide technical and financial opportunities for accelerating the transition to the circular economy in the region’s tourism sector.
- 3.39 **Improvements in sector sustainability will require environmental statistics systems applied to the tourism sector.** Many countries, including some in Latin America and the Caribbean, have developed tools to measure the positive and

negative effects of tourism activity on the environment. However, conceptual and methodological hurdles in measurement processes mean that these environmental tools or indicators cannot be used for comparison purposes (Aranda and Lardiés-Bosque, 2014). As a result, the UNWTO is promoting the development of a common framework for measuring the sustainability of tourism at both the national and subnational levels. The [International Network of Sustainable Tourism Observatories](#) (INSTO) currently has 31 members and was created to monitor the impact of tourism at the destination level (including in Mexico, Brazil, Panama, Guatemala, and Argentina). There is a need to expand and strengthen this network.

3. Climate change adaptation policies in the tourism sector

- 3.40 **For some types of destination, adaptation measures will be essential for coping with climate change risks** (IPCC, 2007). In Bolivia, for example, a climate change museum has been established as an adaptive measure in response to recession of the Chacaltaya glacier, which has prevented in situ visits (Kaenzig et al., 2016). Another example are the initiatives implemented in destinations such as the Mediterranean, which include promoting vacation packages in low season and expanding shaded areas and planting vegetation along streets (Becken and Hay, 2012). In the case of skiing, artificial snow production has been the main adaptation alternative available so far, with all the potential negative environmental effects that this entails (Steiger et al., 2017; Morrison and Pickering, 2013). In transportation and other infrastructure planning, adaptation initiatives have focused on developing standards and specifications for enhanced resilience (Becken et al., 2012).
- 3.41 **The vulnerability of coastal communities, beaches, and tourism infrastructure in Latin America and the Caribbean means that urgent steps must be taken to increase resilience.** As adaptation measures to rising sea levels in Santos, Brazil, Marengo et al. (2017) proposed the restoration of beaches and dunes, reinforcement of sea defense walls, water pumping, and the construction and upgrading of natural and artificial drainage channels. In Barbados, coastal protection measures have been adopted that take different sea level rise scenarios into account. An evaluation of the economic impact of these coastal stabilization investments demonstrated that they have had positive effects not only in terms of preserving fragile ecosystems but also in generating an additional 9% increase in economic activity (Corral et al., 2016).
- 3.42 **Nature-based solutions can yield economic benefits and help to build resilience** (European Commission, 2021). In tourism, nature-based adaptation uses biodiversity and ecosystem services to reduce the environmental impacts of tourism activities and adapt to the adverse effects of climate change. To reduce their environmental footprint through effective ecosystem management, different destinations have launched planning strategies based on “green” and “blue” infrastructure (Natural Economy Northwest, 2008; European Commission, 2012; Land Use Consultants, Ltd., 2020). Estimating the costs and risks associated with these types of alternative infrastructure (versus “grey” infrastructure) and the steady accumulation of evidence regarding their effects will help to create even sturdier and more adaptive approaches to planning and spatial and tourism management in the coming years (Fairbrass et al., 2018) (paragraph 5.10). A study from Vanuatu (Pacific) demonstrates that adaptation activities based on ecosystem services create benefits for the tourism sector (Loehr, Johana et al. 2020). These measures should be given routine consideration in tourism planning and development

decisions (Beck and Lange, 2016; Bayaraktarov et al., 2016). Reid et al. (2019) analyzed the implementation of nature-based solutions in 13 countries, including Peru, Chile, Costa Rica, Panama, and El Salvador, finding that in addition to environmental benefits, the solutions also yielded social benefits.

- 3.43 **Investments to prevent and reduce disaster risk generate positive returns and are effective in ensuring that the benefits from tourism are sustainable.** Every US\$1 invested in prevention leads to an average reduction of US\$4 in disaster-related losses (Moench et al., 2007; Mechler, 2016). Flood protection investments benefiting several economic sectors (including tourism) in Piura (Peru) and Semarang (Indonesia) achieved economic rates of return of 31% and 23%, respectively (Mechler, 2005). In Vietnam, investments to protect coastal tourist and urban areas from storms and typhoons by restoring mangrove forests were estimated to have avoided losses of US\$52 for each US\$1 invested (Mechler, 2005).
- 3.44 **There are some positive examples in the region of the incorporation of tourism into climate adaptation policies and plans.** Saint Lucia, Jamaica, and Mexico, for example, have included the tourism sector as a component to improve the effectiveness of their national climate change adaptation strategies. Nonetheless, both regionally and internationally, existing adaptation measures in tourist destinations remain partial and insufficient, due mainly to the lack of comprehensive studies of the main vulnerabilities to which tourism is exposed in the different countries and of the effectiveness of different adaptation measures (Silva Santos et al., 2020) (paragraph 5.10). Efforts to ensure coherence between tourism and climate policies represent a “soft” mechanism that is needed to accelerate climate change adaptation in the tourism sector (Santos-Lacueva et al., 2018).

4. Emissions mitigation policies in the tourism sector

- 3.45 **Emissions from the tourism sector need to be measured and disclosed.** Tourism lags behind other sectors in this respect, and the Paris Agreement will place increasing pressure on tourist organizations to report their emissions as standard practice (WTTC, 2015; Scott et al., 2018). A recent example of this effort is provided by Valencia, Spain, which was one of the first cities to measure and verify the carbon footprint of tourism activity through a certification process covering 10 tourism consumption-related spheres (Visit València, 2019). There have also been private sector initiatives such as the Hotel Carbon Measurement Initiative, which is used by 21,000 hotels internationally. Although these types of tools represent a positive step toward measuring and disclosing emissions, their implementation in the sector has so far been limited (Amadeus, 2016). Investor influence can accelerate the implementation of emissions monitoring mechanisms, as demonstrated by the positive visibility achieved by TUI (one of the world’s leading tourism companies) when it featured in the top 20 companies in the annual ranking compiled by Carbon Clear (Amadeus, 2016).
- 3.46 **Offset mechanisms should be combined with climate technologies to reduce emissions from tourism.** The sector has a plethora of initiatives to offset the emissions that it produces. In Costa Rica, for example, the Costa Rican Tourism Institute has created an [online tool](#) to calculate travel-related emissions and make offset payments to different environmental projects across the country. In the private sector, in 2019 Meliá became the world’s first hotel company to use blockchain to offset emissions. This technology allows users to dispense with intermediaries in offset mechanisms and ensure that funds are used for certified sustainable projects.

However, a study has concluded that investment in emissions abatement in the tourism sector, when combined with carbon offsets, is approximately 5% more cost-effective than exclusive reliance on offsetting. The same study also underlines that a dependence on offsets exposes the sector to rising carbon costs and could be perceived as climate inaction (Scott et al., 2015). In recent years, the aviation and cruise industries have been investing heavily in new technologies to reduce emissions, such as electric motors or alternative fuels (Florida-Caribbean Cruise Association, 2019; IATA).⁶ However, these efforts are still voluntary and need to be mainstreamed more quickly across the sector.

- 3.47 **Regulations, subsidies, fiscal incentives, and technical assistance are used as policy tools to promote reductions in tourism emissions.** In the regulatory sphere, for example, the European Renewable Energy Directive has set a target of 10% for the use of renewable fuels in aviation (European Environment Agency et al., 2016). This target has not yet been met due to the disincentives created by fossil fuel prices, highlighting the need to combine legislation with market-based instruments (Scott et al., 2018). Cost-efficient reductions in emissions can be achieved by introducing a tax on fuel or emissions, based on ex ante and ex post impact evaluations (Mayor and Tol, 2007; OECD and UNEP, 2011). At the same time, the tourism sector needs to become more actively involved in designing incentive structures that reward innovation in favor of low-carbon tourism operations (Scott et al., 2018) (paragraph 5.10).
- 3.48 **Demand-side interventions can help to accelerate decarbonization of the tourism sector.** One possible tool for influencing tourism demand is carbon certification, although this is still at an early stage of development. Carbon certification would be used more widely if it were promoted by nonprofit organizations and based on existing, well-known forms of certification, such as energy labeling for domestic appliances (Gössling and Buckley, 2016). Its effectiveness varies between the different source markets (Amadeus, 2016). For example, it has little impact on travel decisions by visitors from the Netherlands (Eijgelaar et al., 2016), but it is effective in relation to potential visitors from China, who are influenced by the social status that such certification can provide (Liu et al., 2015). Gössling et al. (2015) highlight the ability of proactive market segmentation to select and attract visitors who are both economically profitable (expenditure per day) and have a smaller carbon footprint.

E. Policies to improve tourism governance

1. Relations between the tourism authorities and the private sector

- 3.49 **Government support for the tourism sector must be based on the formulation of explicit policies and programs.** Castillo et al. (2015) conducted an ex post evaluation of the tourism development policy of the Province of Salta (Argentina), concluding that it had a positive effect on private sector expectations of business activity. This included an average annual increase in employment creation of 11% from 2003 to 2013, with cumulative growth of 112% over the period. In Brazil, an ex post evaluation of the Tourism Development Program for Northeastern Brazil (PRODETUR I) concluded that each US\$1 of public investment led to US\$7 in

⁶—https://www.iata.org/contentassets/b3783d24c5834634af59148c718472bb/factsheet_newaircraft_technology.pdf.

private investment and US\$1.80 in revenue for the economy of the Northeast, with the program yielding a 27% internal rate of return.

3.50 **PPPs in the tourism sector can improve public-private coordination.** PPPs can offer a variety of benefits: addressing market failures that affect destination sustainability, reducing transaction costs, overcoming public sector fiscal restrictions, offering new opportunities for private sector expansion, aligning public and private interests, facilitating asset maintenance, and managing risks across the entire project life cycle (ECLAC, 2007; IDB, 2020d, 2020e). There has been ample use in the tourism sector of concessions and other types of public-private agreements for creating and operating tourist services in protected areas, as well as for maintaining and managing cultural heritage assets and urban parks, among other types of tourist attractions (IFC, 2013; McDonald, 2014, UNDP, 2014; IDB, 2019b). In Argentina, Brazil, Chile, Colombia, Costa Rica, and Ecuador, for example, national parks with the highest numbers of foreign visitors employ several types of concessions within protected areas, including tourist guide services, boats, souvenir shops, local transportation, hotels, restaurants, and other tourism-related businesses (Barborak, 2012). In Fernando de Noronha, Brazil, an evaluation found that the concession had improved services and created local employment (Estima et al., 2014).

3.51 **Nonetheless, for PPPs to be successful, they must factor in the challenges that can arise due to differing work cultures in the public and private sectors.** A cross-sector analysis points to the following challenges as most common to PPPs (Rybníček et al., 2020): (i) contractual, linked to a lack of transparency in contract clauses and agreements that are incomplete due to the long time horizons involved; (ii) financial, relating to cost overruns and the difficulties faced by the private sector in obtaining the necessary financing; (iii) human resources, due to training and experience constraints; (iv) inadequate allocation of roles and responsibilities between the partners; (v) unequal levels of commitment and trust; and (vi) the operating environment, including political, social, and institutional risks. Adnyana et al. (2015) also emphasize the importance of respecting the sociocultural backdrop to a PPP, taking into account local needs to ensure the success of the project. The following measures can mitigate these risks: (i) strengthening of the project preparation process; (ii) phased PPP planning and negotiation; (iii) updating of regulatory and institutional arrangements through contract flexibility arrangements and monitoring and accountability; (iv) training; and (v) strengthening of structures for management and communication between the partners, among other things (Rybníček et al., 2020; IDB and The Economist Intelligence Unit Limited, 2019; Weiermair et al., 2008). In general, there are gaps in the evidence surrounding best practices in the different models of tourism PPPs (paragraph 5.10).

3.52 **Destination management organizations (DMOs) can also strengthen public-private cooperation.** DMOs are generally developed by the public sector with the aim of overcoming private sector fragmentation (Del Campo et al., 2010). Previously focused more narrowly on tourism marketing, DMOs' responsibilities have evolved to include the strategic planning, coordination, and management of a wide range of tourist activities, including crisis management strategies for destinations (UNWTO, 2019c; Mair et al., 2016). DMOs can be organized along regional lines, as in the case of "destination contracts" developed in France between the public and private sectors to streamline the structuring of new tourist attractions (Pearce, 2021). Other DMOs are organized around specific types of tourism, with examples including

tourism product clubs that create thematic clusters (e.g., wine tourism product clubs), convention bureaus to attract congresses and conventions, or networks of marine resorts. The results achieved by DMOs are highly varied. In the case of Spanish marine resorts, however, sun and beach destinations were successfully deseasonalized (Estaciones Náuticas, 2014).

- 3.53 **A variety of policies can be used to encourage foreign direct investment in the tourism sector, including strengthening institutions.** Fiscal incentives should only be used transparently and with caution. A panel study of 152 countries demonstrates that the efficiency of the legal system and the protection of property rights promote foreign investment and inbound tourism (Gozgor et al., 2019). Additionally, various studies confirm that quality institutions and less corruption have a positive impact on investment levels, as well as on tourism demand and competitiveness (Das et al., 2010; Domareski-Ruiz, 2020; Sou et al., 2021). Anticorruption and institution-strengthening strategies are effective when key players are made aware of the changes to the rules of the game, by enforcing the rule of law, requiring transparency, and adopting reforms to eliminate excessive regulations (IMF, 2016). Therefore, tax incentives should be used when supported by robust socioeconomic and fiscal analyses that demonstrate their suitability compared with other policy alternatives, and they should always be based on transparency and accountability mechanisms. Where their use is supported by previous cost-benefit analyses, the evidence shows that tax incentives that reduce investment costs are usually preferable to those based on business profits. Accelerated depreciation schemes are an example of this, in contrast to tax holidays or exemptions that increase the return on projects that would have taken place even without the incentive (ECLAC/Oxfam, 2019; IMF, 2015; ECLAC et al., 2013). Despite this, tax holidays are the incentives used most frequently in Latin America and the Caribbean, and for longer periods than in other regions (World Bank, 2018). There is a need to strengthen the evidence regarding the effects of alternative policies for attracting the investment best suited to the different types of destinations (paragraph 5.10).
- 3.54 **Policies to support private tourism investment should focus not only on capturing FDI but also on strengthening local businesses** by expanding their access to financing, enhancing their bargaining power, and increasing their capacity to absorb innovation, technology, and business skills within a balanced governance framework (Endo, 2006; Lugemwa, 2014). In terms of access to financing, an evaluation was carried out of a program by Uruguay's [National Agency for Research and Innovation](#) (ANII) (2013) to support innovative entrepreneurs, including in the tourism sector. This found positive results in terms of new business creation, concluding that every US\$1 invested in companies that have survived for three years generated US\$12 in benefits.
- 3.55 **Corporate responsibility programs and codes of conduct, supplemented by legislative instruments, can facilitate public-private mobilization toward environmental and social objectives in tourism destinations.** The overall evidence indicates that tour operators with corporate social responsibility practices have positive effects on local supply ecosystems and experience considerable short-term increases in earnings and sales volume (Goffi et al., 2021). In addition, different codes of ethics have been developed, whereby tourism companies can highlight the stance they have taken against human trafficking and sexual exploitation in the sector. For example, Mexico has the National Code of Conduct for the Protection of

Children and Adolescents in the Travel and Tourism Sector (CCN). These voluntary business practices are accompanied by various regulatory instruments. This is the case for several countries in Latin America and the Caribbean that have criminal laws prohibiting the sexual exploitation of children and adolescents in the context of travel and tourism (ECPAT International, 2016). Moreover, the use of legislation on the disclosure of business practices is gradually gaining in popularity and coverage (ILO, 2018b). In 2015, the United Kingdom became the first country to require that large companies issue an annual statement called the Modern Slavery Statement, to guarantee that human trafficking and exploitation have no place in their business (or respective supply chains). The Modern Slavery Statement model has been gradually spreading to major hotel chains and tourism companies around the world (IDB Invest, 2022). However, the implementation, transparency, and reporting of activities under these different voluntary and regulatory instruments need strengthening, to improve evaluation of their impact and ensure their effectiveness in achieving environmental and social objectives in destinations (ECPAT International, 2016; ILO, 2018b; Business and Human Rights Resource Centre and Modern Slavery Registry, 2019; Dunyak, 2021).

2. Relations between the tourism authorities and local communities

- 3.56 **Governance frameworks that foster the participation of local communities can facilitate the capture and sustainability of benefits from tourism.** Using household surveys in two Chinese destinations, a study assessed two contrasting systems of tourism governance: one based on community-led tourism and the other led by a foreign company. The results indicated that community-led tourism as a model of governance has considerable advantages over a foreign company, as the organic process of participation and growth that it involves has greater impact on local household incomes and quality of life (Qian et al., 2016). Other case studies confirm these same conclusions for Indonesia (Hampton et al., 2015) and Brazil (Helmsing et al., 2011). In general, the attitude of residents to tourism depends on their perception of the benefits obtained from these activities (Nunkoo et al., 2011; Stylidis, 2014). Their participation therefore helps to ensure that the tourism-related development of heritage assets is consistent with local values, improving the sustainability of the investments and reducing the risk of exclusion through phenomena such as gentrification (Partners for Livable Communities, 2014). Different mechanisms exist (narrative, informative, instructional, collaborative) to promote the involvement of communities in developing their local tourism potential, and technology can be used to broaden these participatory processes via platforms, social networks, and other channels (Thees et al., 2020). One example of an informative mechanism for promoting local participation are the awareness-raising campaigns for civil society that have been conducted at coastal tourism destinations in Colombia and Brazil to engage the population in the fight against the sexual exploitation of children. These campaigns have reinforced the effectiveness of other mechanisms such as regulatory instruments and training actions employed to combat sexual exploitation in the tourism sector (Hawke et al., 2016; UNICEF, 2016; Fundación Renacer, 2015).

3. Relations between the tourism authorities and other authorities

- 3.57 **There is a need to strengthen interagency cooperation between tourism and other sectors** (OECD, 2020c). There are numerous mechanisms for cross-sector coordination in the region, in the form of councils, roundtables, interministerial

- committees on tourism, and other, similar units. The mere existence of such arrangements, however, is insufficient to ensure effective coordination. Key obstacles are a weak understanding of reciprocal priorities, a paucity of interagency projects, and a lack of alignment between budgets and coordination objectives (IDB, 2013). Accordingly, joint planning efforts need to be strengthened, including budget allocations. In Japan, for example, interministerial budget allocations have been adopted as a means of harmonizing government efforts in the tourism sector (OECD, 2020c). In Denmark, an institutional evaluation of the public tourism management system led to its simplification and the elimination of unnecessary decision-making levels (OECD, 2020c). In New Zealand, a national prioritization framework has been prepared to guide cross-sector collaboration with respect to tourism infrastructure needs (Deloitte, 2017).
- 3.58 At the subnational level, a number of recent case studies may provide new opportunities for integrated work. For example, Costa Rica's [Social Progress Index](#) (IPS) for tourism, launched in 2016, measures levels of welfare among residents in tourist destinations, thus providing the tourism authorities with a roadmap for prioritizing and aligning social investments. A number of European capitals, such as Barcelona, Paris, and Amsterdam, also appear to be changing their approaches, addressing problems of mass tourism and conflicts between residents and accommodation platforms by integrating tourism planning into urban planning in areas such as housing, the environment, transportation, and mobility (González et al., 2018).
- 3.59 At the regional level, several authors underscore the need to expand interagency cooperation in the area of tourism, to ensure the enforcement of global standards and rules regarding the use of shared regional goods for tourism purposes. One example would be the need to promote regional agreements so that cruise ships under flags of convenience adhere to the same level of environmental, fiscal, and labor requirements in different countries within the same geographic context (Daly et al., 2017; Honey, 2019; University of Chicago, 2021). In any event, further evidence needs to be gathered regarding the impact of the different mechanisms for cross-sector coordination in tourism in Latin America and the Caribbean, at the national, subnational, and regional levels (paragraph 5.10).

4. New technologies and tourism governance

- 3.60 **Technologies can be an important ally for improving tourism governance in destinations.** The [smart tourism destination](#) is defined as “an innovative tourist destination consolidated on the basis of cutting-edge technological infrastructure that ensures sustainable development of the tourist area.” This concept has become gradually established in the sector (Segittur, 2015). The smart tourism destination initiative, which is generally led by the public sector, has created a strategic and operational framework that facilitates a destination's transition to digitalization in coordination with the private sector and civil society. Nonetheless, the empirical findings regarding its impact are still emerging (Buonincontri and Micera, 2016; Del Vecchio and Passiante, 2017; Khan et al., 2017) (paragraph 5.10).
- 3.61 **ICTs are useful for expediting the production of relevant tourism intelligence, thus facilitating sound, coordinated decision-making.** Various studies in the Caribbean, China, and South Korea have used Internet search data (via Google Trends) to generate estimates of tourist arrivals, concluding that Google improves the accuracy of predictions, especially in the short term, compared with other,

traditional methods of estimation (Park et al., 2017; Bangwayo-Skeete et al., 2015; Yang et al., 2015). Meanwhile, sentiment analysis (a machine learning method) can classify social network posts as positive, negative, or neutral, generating a map of destination features that need to be improved. This facilitates public-private coordination around shared objectives (Instituto Valenciano de Tecnologías Turísticas, Invat.tur, 2015). In 2017, a tourism observatory was created in Buenos Aires that uses big data techniques to provide real-time intelligence on both tourist demand (mobility, credit card spending, online searches and ratings for tourist attractions, visitor profiles, etc.) and product supply (hotel rates and occupancy rates, flight frequencies, etc.) in the city. The observatory has proven a useful tool for managing tourist flows in different urban areas and for improving public-private coordination. This has been reflected in a new draft law to stimulate reforms and investment in the city's hotel sector, based on comparative information provided by the observatory on competing destinations (Zerba, 2018). However, these new data sources cannot yet replace traditional statistics that ensure international comparability: there are inherent risks associated with their use, such as user privacy, the willingness of companies to part with their data, and a lack of skills for the accurate processing and analysis of big data (Wirthmann et al., 2016; Eurostat, 2017).

- 3.62 **In an attempt to tackle the new tourism governance challenges posed by technology, the region has moved to [regulate](#) digital accommodation platforms.** In this sense, it is essential to accurately evaluate the costs and benefits of the rules to be applied, taking into account the different alternatives of either adapting regulations to the new technologies or maintaining them and applying them to the new actors (paragraph 5.10). One example of this would be to assess whether in certain areas, such as security, it is better to keep traditional registers (similar to those requested of hosts in Buenos Aires) or whether the new review algorithms inherent to the platforms can help to create systems based on trust, verification, and control that are more agile than regulation (IDB, 2021b).

IV. LESSONS FROM THE BANK'S EXPERIENCE IN THE TOURISM SECTOR

- 4.1 **The lessons learned are drawn from the analysis of a [sample](#) of 24 sovereign guaranteed operations (both completed and in execution), together with 6 IDB Invest projects and 1 IDB Lab initiative.** This analysis was based on a review of documentation linked to the selected project sample, as well as interviews with project team leaders. The main lessons learned are summarized below, broken down into categories based on the sector challenges described above.
- A. Lessons aligned with challenge of strengthening recovery in the tourism sector in the wake of the COVID-19 shock**
- 4.2 **The need to provide assistance at a global level while addressing specific sector needs.** Emergency assistance was implemented at the beginning of the pandemic to protect the region's economic fabric. However, a failure to prioritize the tourism sector meant that existing support for the sector was either limited or restricted to the initial phases of assistance, even though the crisis in tourism was proving longer-lasting than in other economic sectors. With MSMEs making up the majority of the sector, fragmentation is an obstacle when it comes to ensuring that the sector's needs are visible in critical moments like the current crisis. Accordingly,

- it is important to provide support for the sector's cooperative capacity and its ability to articulate comprehensive proposals aimed at influencing government policies.
- 4.3 **The need for reliable, updated information systems.** The crisis has highlighted persistent failings in the region with respect to tourism intelligence systems, not only in terms of the relevance and timeliness of data but also its reliability and accessibility. The sector lacked adequate data tools in the initial moments of the crisis, when decision-making needed to be swift and focused on short time periods. Support needs to be provided for the efforts initiated in several countries in the region to consolidate and update their systems of tourism statistics, incorporating new sources of digital data and new methods such as nowcasting.
- 4.4 **Although attention was initially focused on protecting workers and ensuring business survival, it is equally important to strengthen the resilience of the tourism sector so that it can withstand future crises.** The number of threats affecting the tourism sector has increased steadily in recent years, including disasters, adverse meteorological conditions, and the spread of infectious diseases. Accordingly, it is essential to support the development and implementation of preparedness and response strategies for various types of crises. This will involve making sure that sector needs are integrated into general crisis management policies, as well as supporting the preparation and regular review of crisis management strategies for tourism.
- B. Lessons aligned with the challenge of increasing tourism's economic benefits and contribution to the local economy**
- 4.5 **Strengthening tourism market intelligence systems is a necessary condition for maximizing expenditure generation opportunities,** in that it allows a deep understanding of the consumption preferences and patterns of the different tourism demand segments. Tourism planning in the region is generally focused on the supply side, and it is therefore urgent that this inertia be broken, prioritizing knowledge of the demand side so that destination characteristics can be adjusted to maintain competitiveness in response to market requirements. A number of developments have also arisen due to the spontaneous arrival of short-haul or lower spending tourism demand, meaning that opportunities to improve benefits are being missed. It is important to include studies of both actual and latent demand with a view to selecting those segments of highest economic impact.
- 4.6 **It is important to avoid scattered investments, focusing efforts instead on regions with the highest tourist potential, as indicated by market preferences.** Involving the private sector from the initial stages of tourism planning is an essential requirement for ensuring the sustainability of investments. Tourism planning efforts are key for determining investments with spatial and sector rationales, thus helping to determine the theory of change pursued.
- 4.7 **The success of incentives to increase airline participation in specific markets is unclear.** Such success depends on several factors: (i) the potential of the outbound markets that the governments wish to develop, based on their travel and tourism expenditure propensities; (ii) the specific format of the incentives, and in particular, the extent to which the mechanism harmonizes the economic incentives for airlines with those of the country; (iii) the transparency with which beneficiary companies are selected, and the competitive mechanisms used; and (iv) the duration of the agreements, and arrangements for evaluating and reviewing them.

- 4.8 **Local private investment needs to be supported in order to enhance the likely economic impact of tourism in the destination.** There are persistent market failures related to: (i) the need to reduce information asymmetries in relation to tourism market preferences; (ii) financing difficulties; and (iii) informality, which usually has a negative impact on business investment. There are also weaknesses in professional capabilities in the sector, meaning that it is important to strengthen the supply of timely, relevant tourism training programs based on needs in the different subsectors and geographic areas. Accordingly, it is essential that specific forms of assistance be implemented for tourism enterprises and local providers. Temporary grant assistance, in the form of competitive funding or technical assistance, is effective for mobilizing formal local entrepreneurship networks.
- C. Lessons aligned with the challenge of strengthening the distribution of tourism benefits to vulnerable groups in Latin America and the Caribbean.**
- 4.9 **To ensure that vulnerable groups are included in the benefits from tourist activity, social diagnostic assessments need to be performed of the entire tourism production chain.** These assessments show how tourism expenditure circulates throughout the tourism value chain and whether it reaches vulnerable groups in particular. They can also identify opportunities for strengthening links between tourism and the needs of vulnerable groups. The challenge going forward is to expand and harmonize these types of analyses with a view to establishing conclusions that can be compared across different types of groups.
- D. Lessons aligned with the challenge of strengthening environmental and climate management in tourism**
- 4.10 **To ensure sustainable long-term outcomes, support must be deepened for systems to monitor environmental quality in the destinations.** Strategic environmental assessments have guided the selection of areas suitable for investment in the short term and have revealed environmental fragilities and problems that needed to be addressed in the programs.
- 4.11 **The significance of climate change for the tourism sector must be taken into account in sector planning and investment.** Support urgently needs to be provided for the sector's active transition to the low-carbon economy, strengthening above all its resilience to climate change at the local level. To this end, tools for evaluating risks and potential impacts should strengthen analyses of climate vulnerability. There is also a need to build awareness among tourism authorities about their role in promoting decarbonization of the sector.
- 4.12 **The area least covered by tourism statistics is that of sustainable tourism.** Measurement of the impact of tourism on the environment and its interrelationships with climate can be facilitated by new sources of technological information (big data), which offer greater geographic and temporal granularity than traditional data sources.
- E. Lessons aligned with the challenge of improving tourism governance**
- 4.13 **The need to strengthen institutional capacity in the tourism sector.** The execution of tourism operations has generally been the responsibility of the tourism authorities. The expectation has been that these entities will exercise a leadership and policy coordination role, together with participation by the authorities responsible for planning, the environment, infrastructure, and culture, as well as local governments that are beneficiaries. Despite the progress made under specific

institutional strengthening components in tourism operations, problems of leadership by the tourism authorities and interagency coordination persist. This is also reflected in projects to promote regional integration in tourism, in which progress has been slow and gradual. Support should be continued for institutional strengthening processes to facilitate timely, comprehensive program execution and the consolidation of government visions for development of the tourism sector.

- 4.14 **The public sector plays a key role in digital transformation of the tourism sector.** Strengthening public sector technical, financial, and regulatory capabilities is essential. The speed of technology adoption in the Latin American and Caribbean tourism sector will depend on a combination of investment in digital infrastructure and the development of human capital skills and innovation in business models and processes. Different policy instruments should be explored that help to create equitable conditions for all stakeholders in the tourism sector, such as digital accelerators, training programs, revised regulatory frameworks, and the introduction of system interoperability standards.

F. Crosscutting and operational lessons learned

- 4.15 **Ex ante economic evaluations of tourism projects must be based on demand projections and their effects on the economy.** The Bank has developed a standardized framework that facilitates the comparison of different projects over time and uses a stated preferences design to improve projections for tourism demand “with the project.” The framework also includes microsimulation modules for the detailed assessment of impacts on poverty and the most disadvantaged households.
- 4.16 **Ex post tourism project evaluations should use an array of tools to capture a broad range of scenarios.** The Bank has been using analytical methods that aim to represent entire local and regional economies through Social Accounting Matrices. Nonetheless, it is important to have a range of methodological tools that offer flexibility in the face of challenges and adjustments to theories of change that may occur during implementation of a project.
- 4.17 **In terms of operations, the tourism authorities’ limited technical experience in designing and executing works means that ad hoc assistance is needed to help solve technical challenges,** including: (i) delays in contracting and preparing detailed designs for the works, which delay the entire operation; (ii) under or overestimates of costs; and (iii) variations in the cost of works. Solutions to these problems have included: (i) providing technical assistance resources to executing agencies; (ii) hiring firms with experience in works investments to support the executing agency; and (iii) including a contingency category in works budgets.
- 4.18 **One challenge observed in projects is the adequate evaluation of their economic, financial, and technical viability taking into account maintenance needs upon completion.** A good practice that has been adopted and should be continued involves the preparation of technically robust studies before the works are executed, accompanied by management plans.
- 4.19 **The main lessons learned from non-sovereign guaranteed operations are as follows:** (i) careful sponsor selection is important and should take into account the level of commitment to the project, execution and administrative capabilities, and the existence of contingency plans in the event of any additional costs required to complete the project; (ii) the complexity of negotiating new projects can lead to

delays, meaning that flexibility should be offered with regard to loan amortizations in the first few years; (iii) project financing should be accompanied by support for positive socioenvironmental actions in the destination; (iv) a flexible array of financial instruments should be offered to serve a wide range of client challenges and needs (e.g., shared risk facilities or bond issues); and (v) joint sector dialogue with the Bank's public-sector window strengthens the value added provided by the IDB Group.

V. LINES OF ACTION FOR WORK IN THE TOURISM SECTOR

- 5.1 Based on the diagnostic assessment presented in Section II, the literature review in Section III, and the lessons set out in Section IV, five lines of action and a knowledge agenda are proposed for sector work in the region. These will need to be adapted to the reality of each country.

1. Line of action 1. Strengthen recovery in the tourism sector in the wake of the COVID-19 shock

- 5.2 **In the short term, there is a need to continue supporting the sector's response to COVID-19 in order to accelerate its recovery**, through: (i) constant monitoring of demand-side tourism preferences to allow adaptation of the tourism product (e.g., in the area of health safety) and help attract segments with greater propensity to travel; and (ii) technical and financial support for tourism businesses, aimed at facilitating a recovery in business and labor activity while the current uncertainty persists.

- 5.3 **The experience of COVID-19 has underlined the urgency of strengthening the tourism sector's capacity to manage future crises.** Improving crisis management will involve combining institutional, technical, and financial instruments, including the mobilization of private funding through new financial structures and thematic bonds. These instruments should allow: (i) formal designation and continued operation of crisis management groups in the tourism sector; (ii) identification of risks, with assessments of the probabilities, time periods, and potential impacts on the sector of each type of risk; (iii) preparation, management, monitoring, and evaluation of the impact of crises on tourism; (iv) formulation of contingency plans to mitigate the impact of each type of risk; and (v) awareness-building to improve understanding of the level of vulnerability of destinations to different types of crisis.

2. Line of action 2. Increase tourism's economic benefits and contribution to the local economy

- 5.4 **Market failures that inhibit tourist arrivals and expenditure in the region (pull and push factors) need to be addressed.** To this end, the following actions must be prioritized: (i) supporting orderly tourism planning processes that emphasize spatial planning and interagency coordination, facilitate the upgrading of public goods (including regional goods), and help to prioritize those types of tourism with the greatest ability to differentiate, deconcentrate, and diversify tourism activity; (ii) developing innovative market intelligence systems that facilitate effective demand segmentation and an understanding of the tourism product and potential investors; (iii) programs to promote public and private investment in infrastructure for connectivity and basic services that enable tourist activity and meet the needs of both visitors and the resident population; (iv) designing and implementing cost-effective tourism promotion and marketing strategies, coordinating

public-private efforts with a focus on digital alternatives; (v) improving both real and perceived destination security (physical, health, psychological, digital); (vi) facilitating access to technology resources and expanding digital capabilities on the part of MSMEs in the tourism sector, including issues such as cybersecurity; and (vii) providing financing and professional training and technical assistance services to the private sector in order to maximize productivity, innovation, and the sustainability of private sector investments.

- 5.5 **To strengthen the ability of the tourism sector to contribute to the local economy, technical expertise must be combined with policy tools.** This requires: (i) generating and disseminating knowledge regarding the structure of tourism expenditure and its relationship with local economies (for both current and potential sources of demand), allowing priority segments to be selected; and (ii) designing appropriate regulatory, fiscal, labor, financial, and technical tools aimed at strengthening local tourism production chains and increasing the tourism multiplier.

3. Line of action 3. Strengthen the distribution of tourism benefits to the most vulnerable social groups in Latin America and the Caribbean.

- 5.6 **Poor households and other vulnerable groups must be placed at the center of tourism development strategies,** while at the same time meeting the requirements of the tourism market to ensure that interventions are viable. To this end, the region requires different technical, financial, and regulatory tools that allow: (i) the production of inventories and data analyses regarding vulnerable groups in tourist destinations, using standardized definitions and methodologies; (ii) the design and implementation of social inclusion plans for destinations, adapting actions to the specific needs of each group by income, gender, race, age, physical ability, or other exclusion factor; (iii) the implementation of best employment practices in the sector, with emphasis on vulnerable groups, including business and labor formalization programs; (iv) support for credit and guarantee mechanisms, with emphasis on local MSMEs with fewer resources; (v) training for MSMEs and local human resources in the sector; (vi) the development and evaluation of social and accessible tourism programs; and (vii) support for inclusive practices in the private sector that have the potential to be replicated.

4. Line of action 4. Strengthen environmental and climate management in tourism

- 5.7 **Tourism development policies should take into account both the adverse effects of environmental degradation on tourism and the impact of tourism on the environment.** Support therefore needs to be provided for: (i) strategic environmental evaluations of tourism development policies, plans, and programs and environmental impact studies for tourism investments; (ii) updating, implementing, and enforcing environmental regulatory frameworks; (iii) developing effective corporate certification and social responsibility mechanisms; (iv) land zoning strategies and spatial plans, the declaration of areas of tourist interest, environmental information systems, and financing, technical assistance, and training instruments for the effective environmental management of tourism in protected areas, biological corridors, and ecosystems of high ecological value for destinations; (v) technical and financial assistance for local authorities to improve their environmental management of destinations, including waste management; and

(vi) designing regulatory and financial incentives to support progress toward a circular economy in tourism.

- 5.8 **Actions to mitigate and adapt to the bidirectional linkages between tourism and climate change are of particular importance.** In this respect, there is a need to: (i) prepare climate vulnerability maps for destinations in the region and integrate these into tourism planning; (ii) develop inventories and matrices of opportunities for investment in green and blue infrastructure in the destinations, supporting adaptation and mitigation through innovative opportunities for the use of natural capital; (iii) incorporate disaster risk management into spatial planning in destinations and feasibility studies for tourism investments; (iv) develop and disseminate harmonized systems for measuring sector emissions; (v) mobilize mixed climate financing; (vi) develop innovative mechanisms for the transfer of climate risk; (vii) promote low-carbon tourism through innovative technology for reducing emissions and actions to influence supply and demand (e.g., carbon certification initiatives for the tourism sector); and (viii) carry out climate training in the sector.

5. Line of action 5. Improve the regional tourism governance framework.

- 5.9 **To successfully implement the first four lines of action, it will be critical to strengthen tourism governance.** The following policies can further this objective: (i) improving the technical and budgetary capacities of tourism institutions so that they can successfully lead the sector at the subnational, national, and supranational levels; (ii) supporting the formulation of sector plans and programs based on citizen participation and interagency and cross-sector coordination; (iii) fostering the use of technology that facilitates knowledge and information transfer, promoting the smart tourism destination model adapted to Latin America and the Caribbean; (iv) cultivating business networks in destinations to improve the ability of tourism MSMEs to absorb business management, innovation, and technology adoption skills; (v) designing and implementing public-private coordination mechanisms such as DMOs and PPPs to leverage capital for promoting destinations, developing resources, or providing infrastructure and basic services; (vi) developing innovative frameworks (regional, national, and subnational) for attracting foreign tourism investment, based on transparency, accountability, and the incorporation of positive impact criteria (economic, social, and environmental); (vii) providing financial and technical support for private investment in the tourism sector by national and local companies; (viii) updating regulatory frameworks for the sector to include new forms of digital activity; and (ix) supporting interagency coordination for the preparation or updating of spatial plans that incorporate the cross-sector skills necessary for sustainable tourism development in areas such as land use, waste management, water use, sewer systems, transportation and communications infrastructure, disaster management, and the protection of local culture, among others.

6. Knowledge agenda

- 5.10 **It will be important to develop a regional knowledge agenda for the tourism sector that covers important issues for which there is a lack of information,** as referred to in detail throughout this SFD. These issues include: (i) regarding the first challenge of strengthening sector recovery following the COVID-19 shock: demand-side behavioral responses in tourism and potential structural changes in tourism product attributes, as well as the evaluation of policies to support the tourism enterprise sector and stimulate demand during COVID-19; (ii) regarding the second

challenge of increasing tourism's economic benefits of tourism and contribution to the local economy: determinants of productivity by subsector and type of destination, as well as best practices for strengthening linkages between tourism and the local economies; (iii) regarding the third challenge of strengthening the distribution of tourism benefits to vulnerable groups in Latin America and the Caribbean: determinants and developments in the informal tourism sector in the region, the distributive effects of different policies to encourage social inclusion across the tourism production chain, and best practices in social and accessible tourism; (iv) regarding the third challenge of strengthening environmental and climate management in the sector: the effects of destination protection instruments (e.g., areas of tourist interest), the effectiveness of policies for integrating nature-based solutions into tourism planning and management processes, the sector's vulnerability to climate change and the effectiveness of sector climate mitigation and adaptation policies, and the impact of green and blue infrastructure in the sector; and (v) regarding the fifth challenge of improving tourism governance: documenting the types of gaps in priorities between the public and private sectors, the effectiveness of different PPP models, best practices for digital regulation in the sector, evaluation of the effectiveness of the smart tourism destination model, and evidence of the differential impact of different mechanisms for interagency and cross-sector coordination in tourism.

ANNEX: FIGURES AND TABLES

**Table 1. Tourism Dependency Index:
Ranking out of 166 countries internationally, 2018**

[\[Return to main text\]](#)

Aruba	1
Antigua and Barbuda	4
The Bahamas	5
Saint Lucia	6
Dominica	9
Grenada	11
Barbados	14
St. Vincent and the Grenadines	15
St. Kitts and Nevis	16
Jamaica	17
Belize	18
Dominican Republic	33
Haiti	44
Panama	46
Costa Rica	52
Honduras	60
El Salvador	62
Mexico	63
Uruguay	73
Nicaragua	78
Guatemala	85
Peru	90
Argentina	91
Chile	99
Trinidad and Tobago	100
Colombia	103
Bolivia	111
Guyana	120
Brazil	128
Ecuador	132
Venezuela	134
Paraguay	158
Suriname	160

Source: Mooney and Zegarra (2020). *Extreme Outlier: The Pandemic's Unprecedented Shock to Tourism in Latin America and the Caribbean*, June, IDB Policy Brief, 339.

Table 2. Tourism GDP multipliers, direct and total (2014-2019)

[\[Return to main text\]](#)

Region	Direct multiplier		Total multiplier	
	2014	2019	2014	2019
Southern Cone	0.477	0.481	1.448	1.421
Andean Community	0.499	0.521	1.329	1.286
Central America	0.454	0.457	1.186	1.209
Mexico	0.610	0.602	1.106	1.137
Caribbean	0.468	0.475	1.184	1.224
Latin America	0.531	0.537	1.288	1.269
World	0.465	0.473	1.497	1.517
Europe	0.455	0.459	1.169	1.169
North America	0.481	0.513	1.496	1.528
Asia-Pacific	0.442	0.443	1.456	1.431
Africa	0.494	0.538	1.261	1.236
Middle East	0.490	0.495	1.312	1.244
English-Speaking Caribbean	0.465	0.479	1.129	1.132

Source: Based on data from the WTTC.

Table 3. Tourism sector labor productivity by region (2014 and 2019)

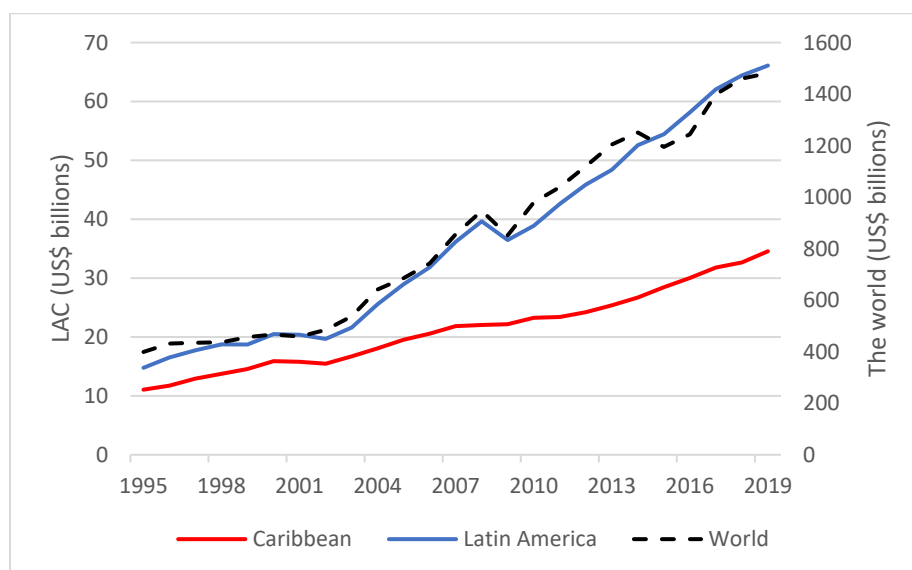
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Region	Productivity (US\$)		Average annual growth rate (%)	
	2014	2019	2009-2014	2014-2019
Southern Cone	30,419.65	24,269.30	5.7%	-3.0%
Andean Community	16,533.50	12,369.19	3.2%	-4.7%
Central America	2,574.31	2,705.30	8.3%	1.1%
Mexico	33,497.42	29,459.90	5.4%	-2.8%
Caribbean	21,536.77	22,765.97	3.1%	0.4%
Latin America	20,486.22	16,985.41	5.2%	-3.2%
World	22,344.70	23,206.43	2.7%	0.7%
Europe	57,038.12	50,075.17	2.5%	-1.9%
North America	76,281.61	91,282.45	2.1%	3.0%
Asia-Pacific	10,096.41	12,295.24	5.4%	3.5%
Africa	9,048.82	8,167.86	3.8%	-2.8%
Middle East	31,983.65	38,409.87	5.3%	2.7%

Source: Based on data from the WTTC, 2020.

Figure 1. Trends in international tourism spending (1995-2019)

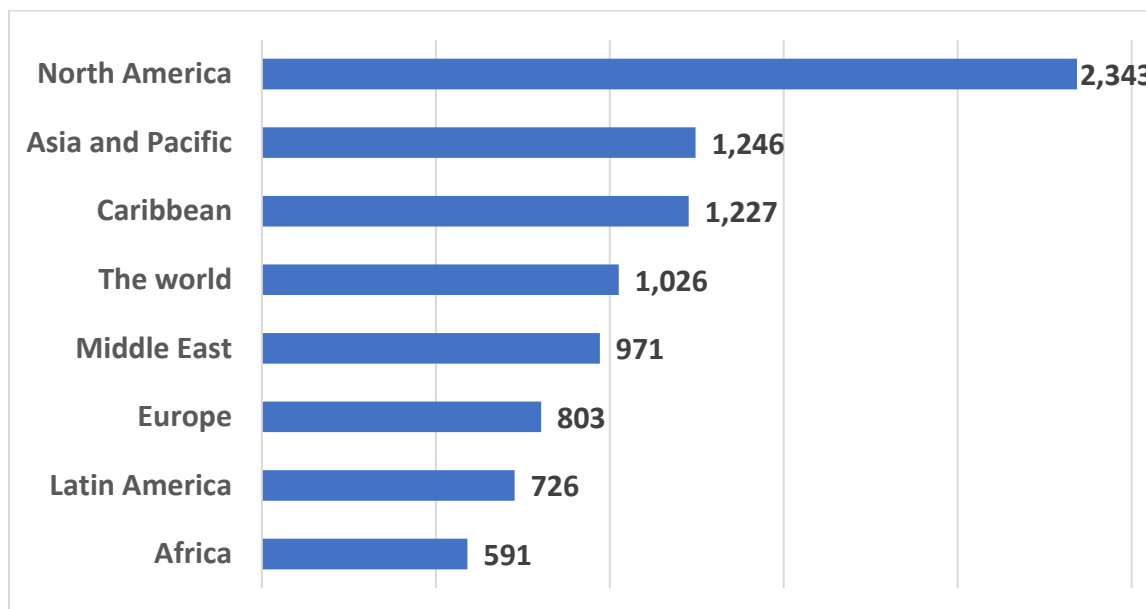
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Source: Based on data from World Development Indicators (2020) and the World Tourism Organization (UNWTO) (2021). Tourism expenditure in current U.S. dollars (billions). Left-hand scale = Latin America and the Caribbean; Right-hand scale = world.

Figure 2. Average expenditure per international arrival, 2014-2019 (in U.S. dollars)

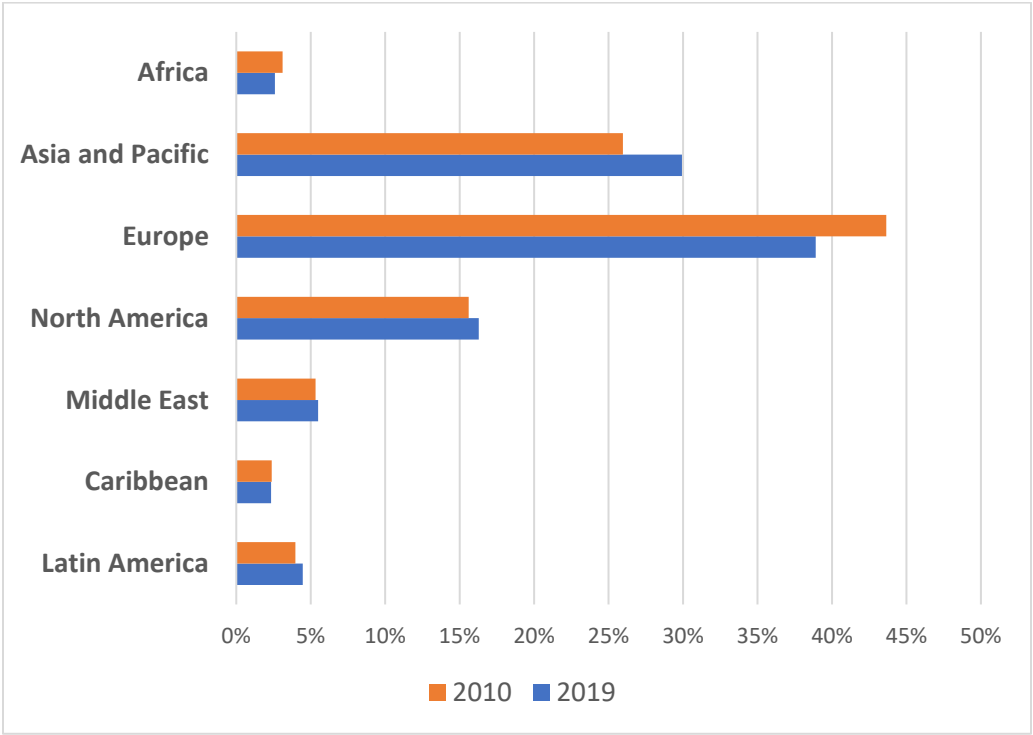
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Source: Based on data from UNWTO, Tourism Highlights 2020.

Figure 3. Market share of inbound tourism expenditure (2010-2019)

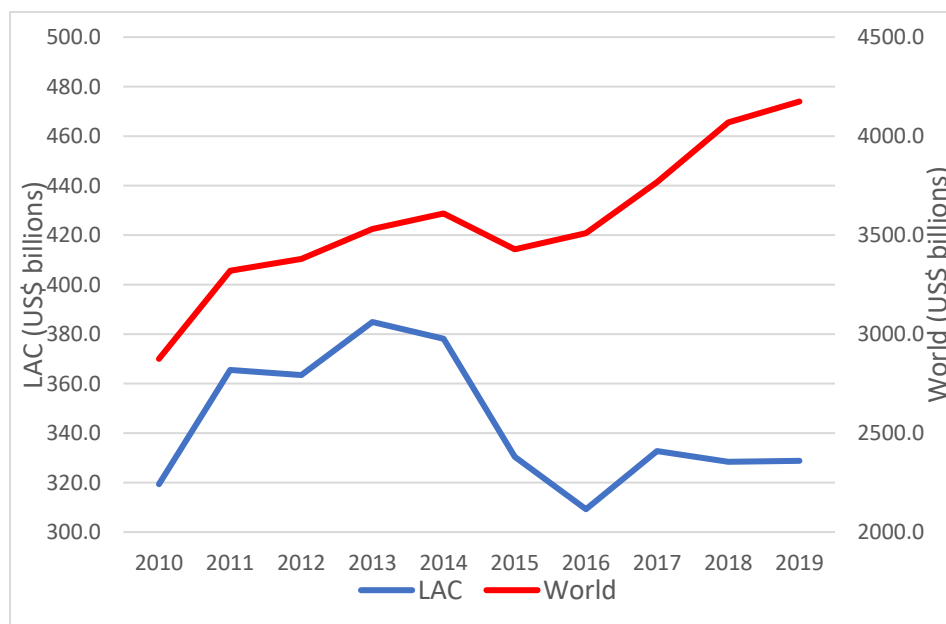
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Source: Based on data from UNWTO, Tourism Highlights 2020.

Figure 4. Trends in domestic tourism expenditure in Latin America and the Caribbean and worldwide (2010-2019)

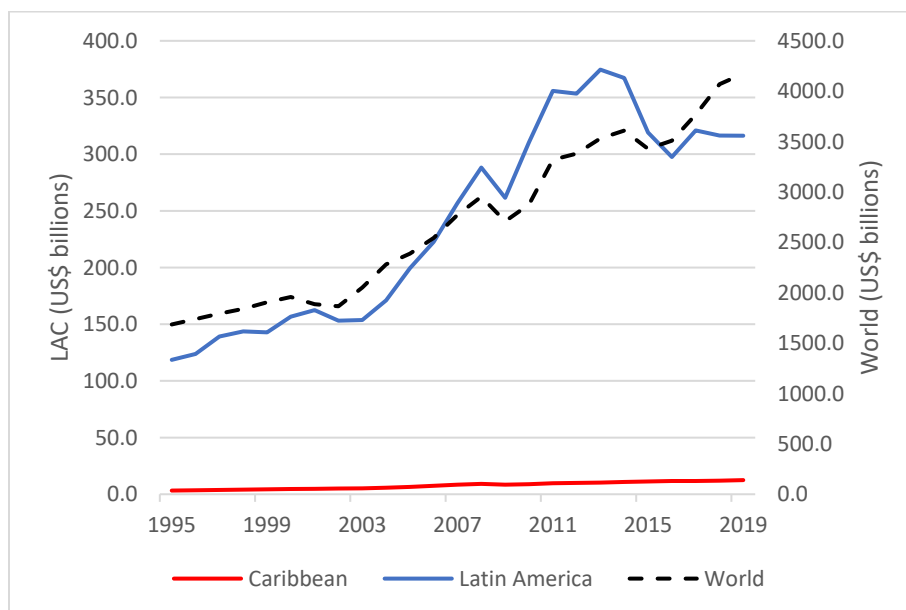
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Source: Based on WTTC data, 2020. Tourism expenditure in current U.S. dollars (billions). Left-hand scale = Latin America and the Caribbean; Right-hand scale = world.

Figure 5. Trends in domestic tourism expenditure (1995-2019)

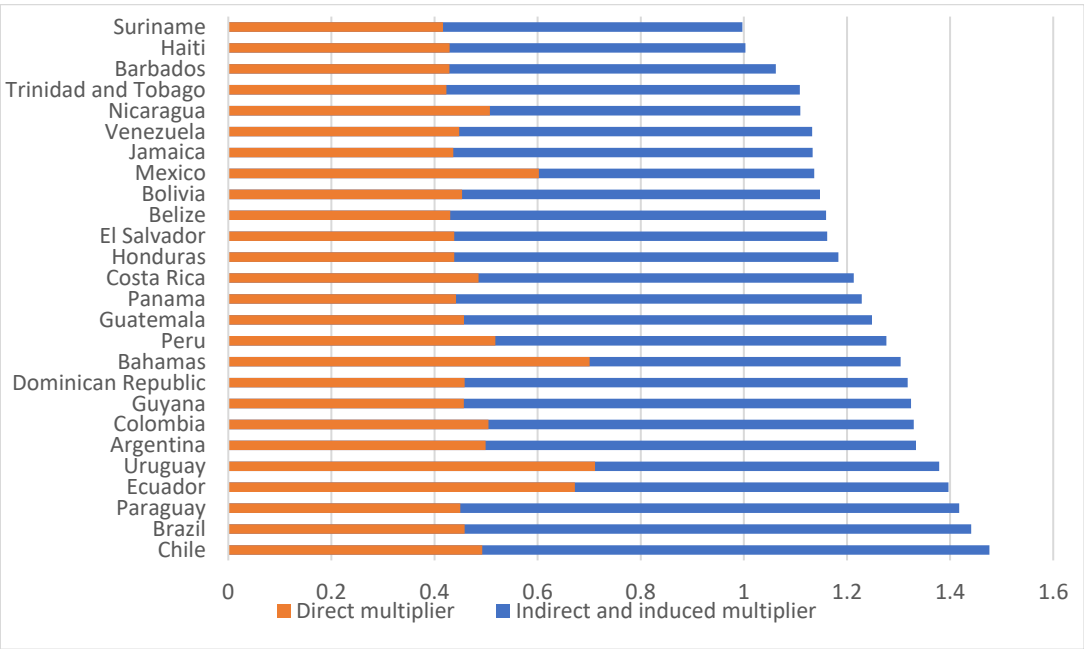
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Source: Based on WTTC data, 2020. Tourism expenditure in current U.S. dollars (billions). Left-hand scale = Latin America and the Caribbean; Right-hand scale = World.

Figure 6. Tourism multiplier in Latin America and the Caribbean, 2019

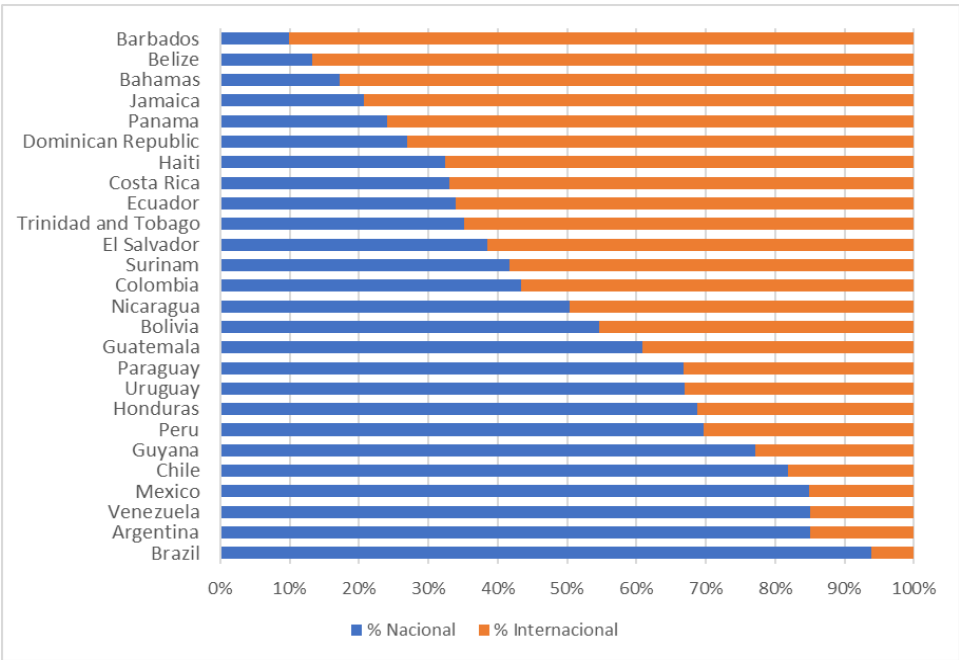
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Source: Based on WTTC data, 2020.

Figure 7. Share of inbound and domestic tourism expenditure in Latin America and the Caribbean, 2019

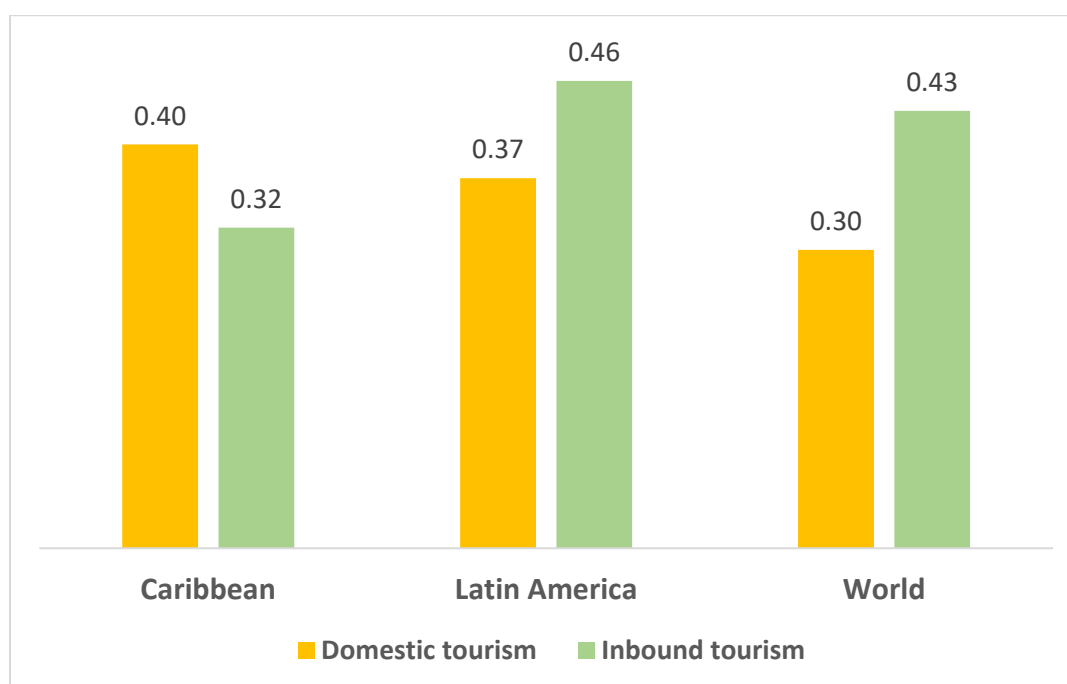
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Source: Based on WTTC data, 2020.

Figure 8. Coefficient of variation for inbound and domestic tourism expenditure

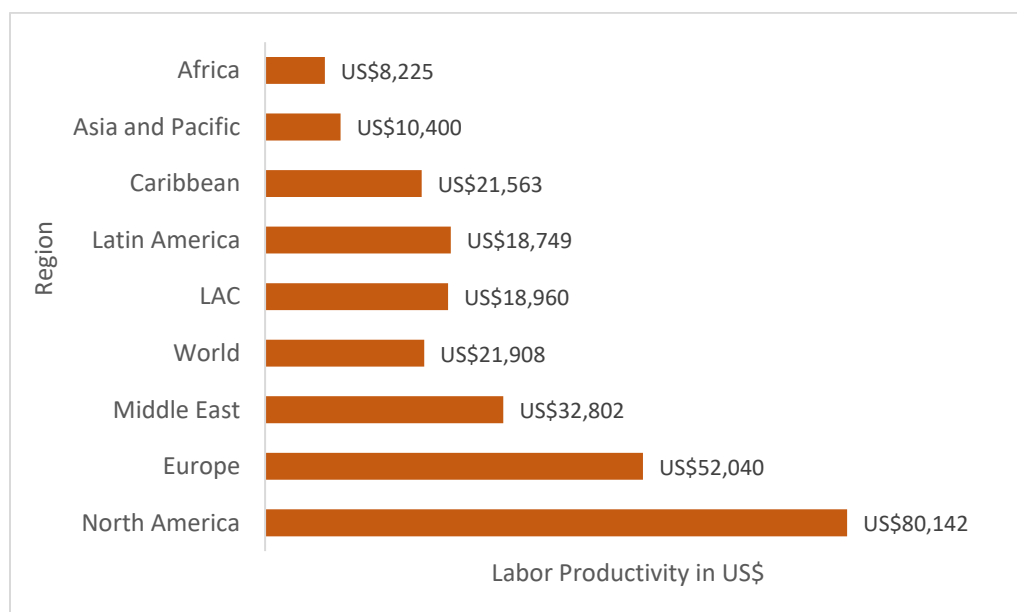
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Source: Based on data from the WTTC (2020), World Development Indicators (2020), and UNWTO (2021).

Figure 9. Average tourism sector labor productivity, 2010-2019

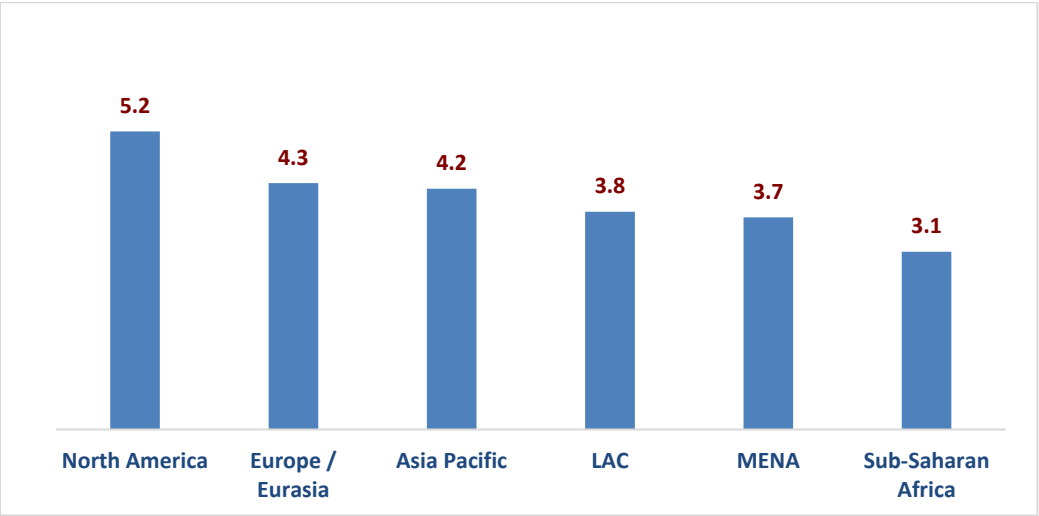
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Source: Based on WTTC data, 2020.

Figure 10. WEF Travel and Tourism Competitiveness Index, 2019

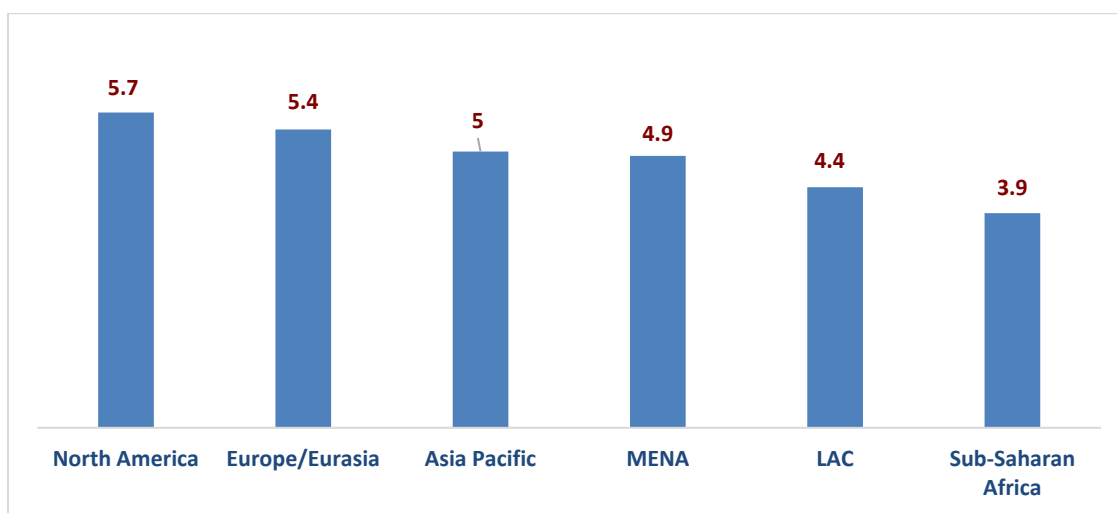
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Source: Travel and Tourism Competitiveness Index (WEF, 2019).

Figure 11. WEF Travel and Tourism Competitiveness Index, 2019 > Enabling environment

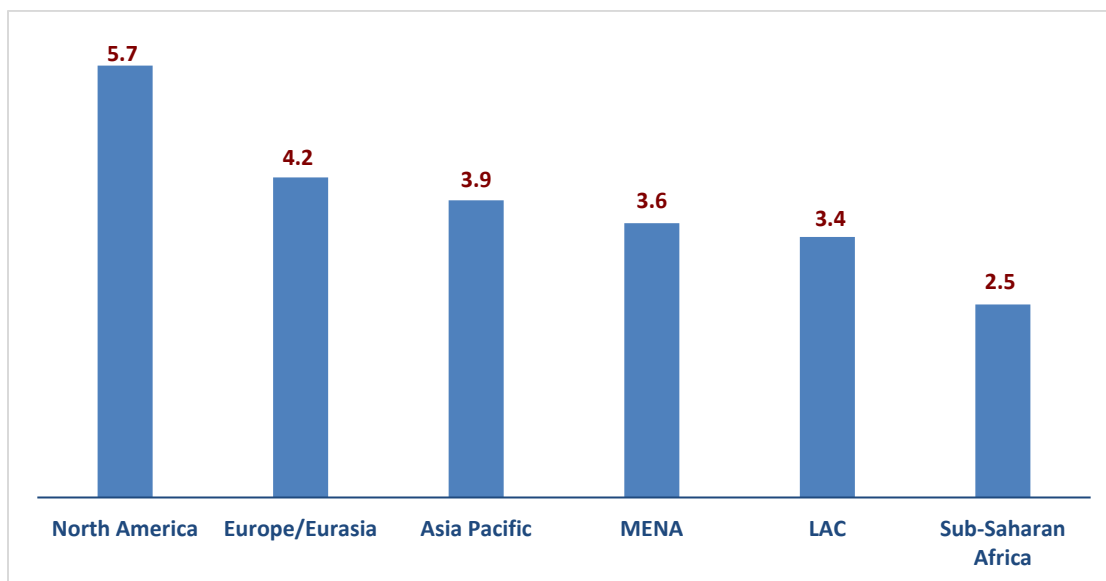
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Source: Travel and Tourism Competitiveness Index (WEF, 2019).

Figure 12. WEF Travel and Tourism Competitiveness Index, 2019 > Infrastructure

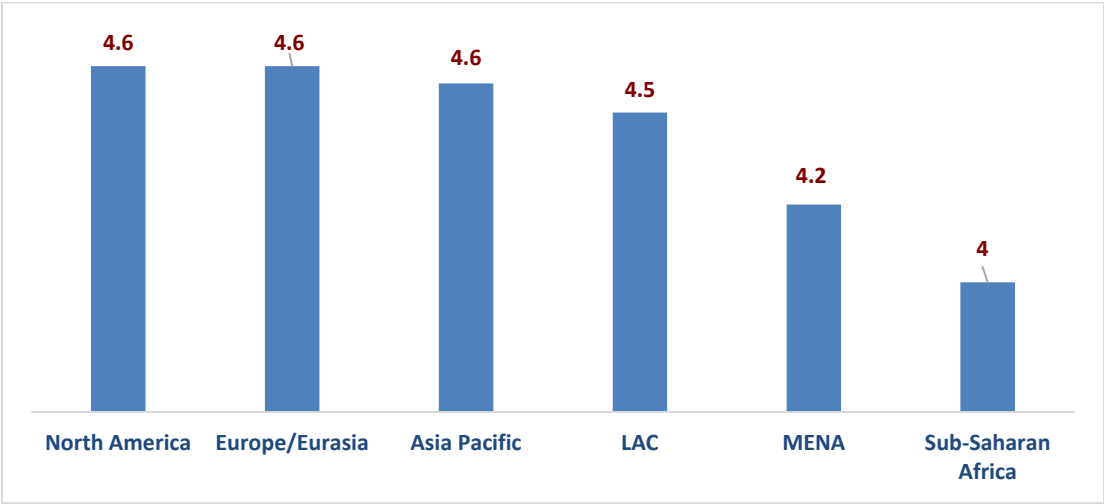
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Source: Travel and Tourism Competitiveness Index (WEF, 2019).

Figure 13. WEF Travel and Tourism Competitiveness Index, 2019 > Tourism Policy

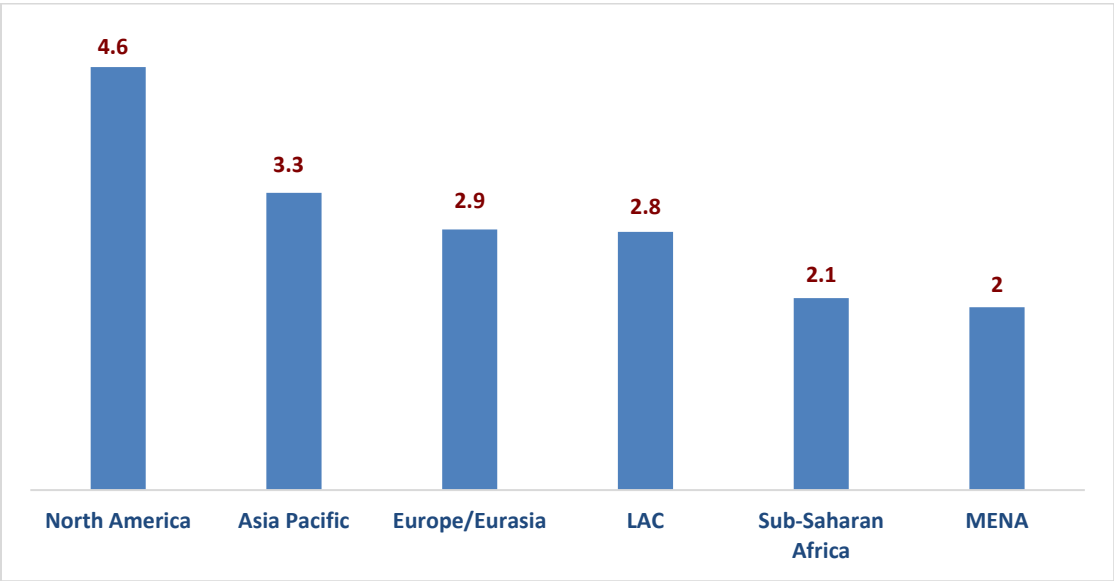
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Source: Travel and Tourism Competitiveness Index (WEF, 2019).

Figure 14. WEF Travel and Tourism Competitiveness Index, 2019 > Natural and cultural resources

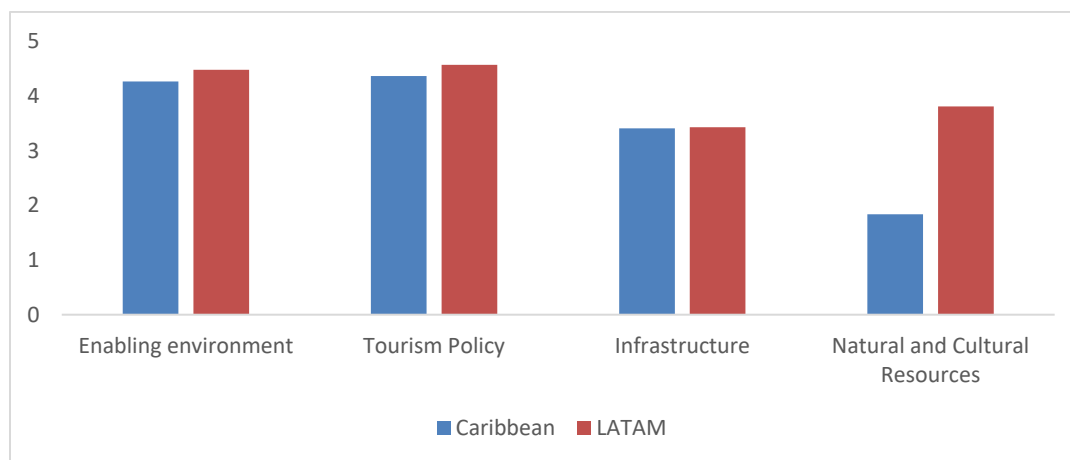
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Source: Travel and Tourism Competitiveness Index (WEF, 2019).

Figure 15. WEF Travel and Tourism Competitiveness Index, 2019 > Caribbean and Latin America

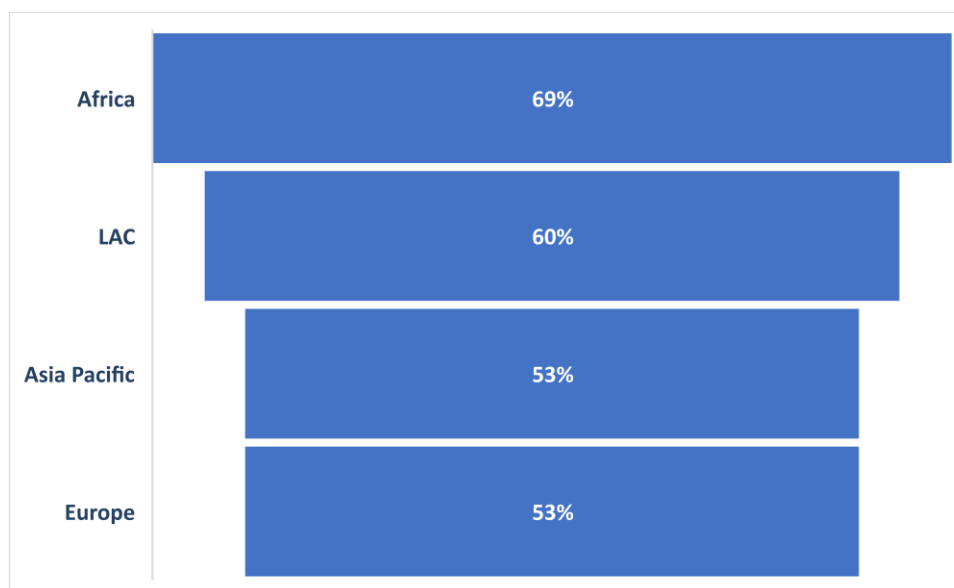
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Source: Travel and Tourism Competitiveness Index (WEF, 2019).

Figure 16. Proportion of women employed in the hospitality sector

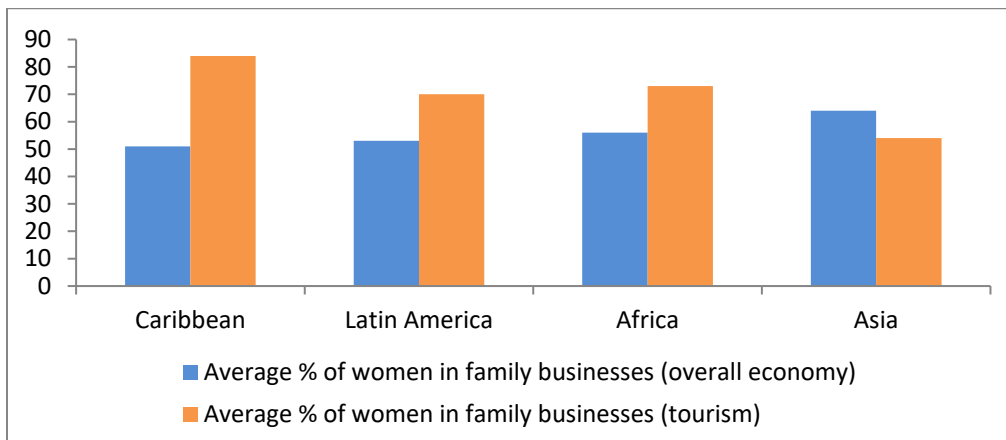
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Source: UNWTO and United Nations (2019), Global Report on Women in Tourism.

Figure 17. Proportion of women employed in family businesses (unremunerated)

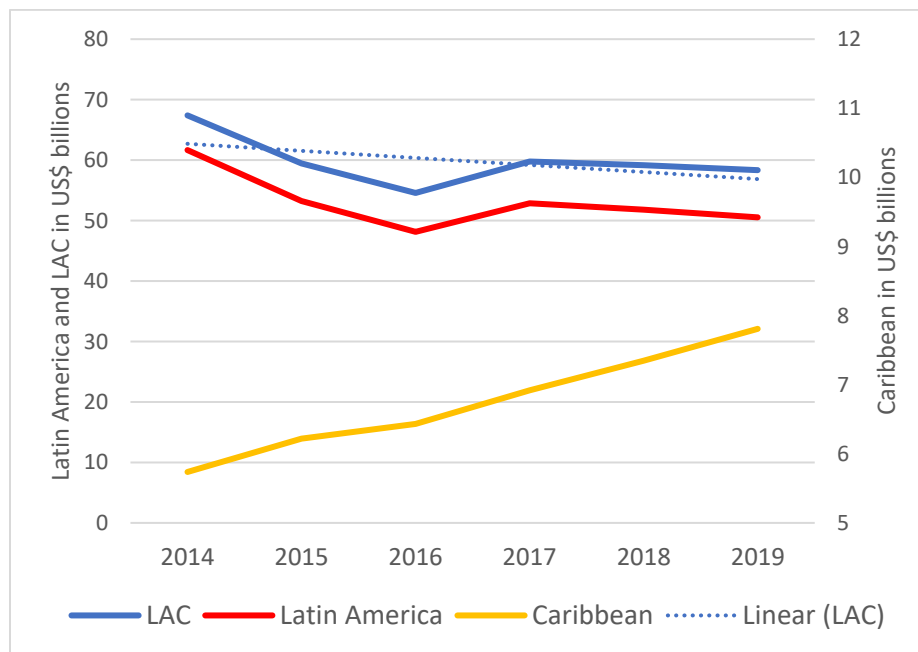
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Source: UNWTO and United Nations (2010), Global Report on Women in Tourism.

Figure 18. Investment trends in the Latin American and Caribbean tourism sector (2014-2019)

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Source: Based on WTTC data, 2020. Left-hand scale = Latin America and the Caribbean;
Right-hand scale = Caribbean.

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