

# The impact of the COVID-19 pandemic on the tourism sector in Latin America and the Caribbean, and options for a sustainable and resilient recovery

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Coordinator



UNITED NATIONS

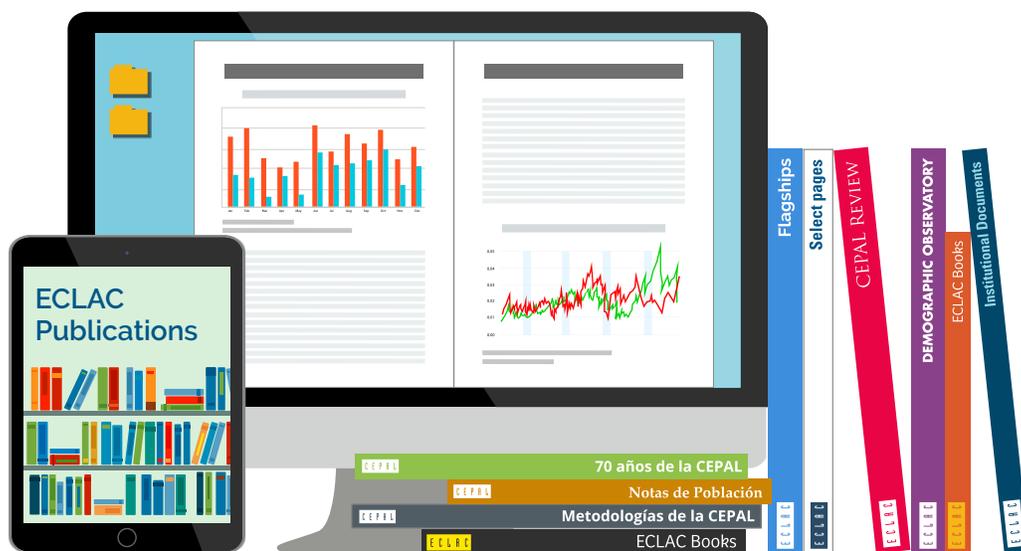
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**COVID-19**  
**RESPONSE**



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This document has been prepared by following staff from the headquarters of the Economic Commission for Latin America and the Caribbean (ECLAC) in Santiago, the ECLAC subregional headquarters for the Caribbean, the ECLAC subregional headquarters in Mexico and the ECLAC office in Brasilia, under the coordination of Nanno Mulder: Dillon Alleyne, Claudio Aravena, Nicole Bidegain Ponte, Martha Cordero, Claudia De Camino, Olaf De Groot, Lydia Rosa Gény, Camila Gramkow, Michael Hendrickson, Jorge Mario Martínez, Sheldon McLean, Javier Meneses, Carlos Mussi Fialho, Maria Alejandra Ovalle, Machel Pantin, Leda Beatriz Peralta Quesada, Gabriel Pérez-Salas, Ramón Pineda, Ricardo Sánchez, Nyasha Skerrette and Hidenobu Tokuda.

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## **Abstract**

Since April, tourism in the region has almost come to a temporary standstill as a result of the coronavirus disease (COVID-19) pandemic. This temporary paralysis has not only hit Caribbean economies and employment hard, but also many local communities in Latin America. Tourism accounts for half of services exports in Latin America and the Caribbean and represents significant shares of gross domestic product (GDP) and employment. An impact scenario shows that the slump in tourism may cause total GDP growth in the Caribbean and Latin America to fall by 8 percentage points and 1 percentage point, respectively, while total employment could potentially decline by 7 percentage points in the Caribbean and 1 percentage point in Latin America. As countries have taken measures to mitigate the impact of the crisis on tourism, recommendations are provided to step up the sector's preparation for the economic recovery, while enhancing diversification as well as environmental and social sustainability.



## Introduction

From April 2020 onwards, tourism in Latin America and the Caribbean has come to a temporary standstill as a result of the coronavirus disease (COVID-19) pandemic. However, countries and subregions have been affected differently. The infection rates and victims illustrate this, keeping in mind that countries vary in their testing intensity. In terms of number of COVID-19 confirmed deaths per 100,000 population, eight countries in the region are among the 20 most affected countries in the world by mid-2020<sup>1</sup>. Furthermore, in the Caribbean, the COVID-19 pandemic is occurring at a time when countries have already been hit by various economic and natural shocks, including hurricanes and other extreme weather events, high levels of indebtedness, and limited access to concessional funding while facing a new hurricane season.

Tourism has been one of the fastest and hardest hit sectors of the economy. According to the UN World Tourism Organization (UNWTO, 2020a), international tourist arrivals may fall between 60% and 80% in 2020. This sector is not only one of the main contributors to exports, the economy and employment in the Caribbean, but also in many cities and local communities in Latin America. Considering the high uncertainty about the duration of the pandemic in different parts of the region, and associated contingency and subsequent relaxation measures, it is difficult to estimate the short, medium and long-term impacts of the pandemic on tourism.

In this paper, the contribution of tourism to exports, gross domestic product (GDP) and employment is reviewed, together with the recent downturn in this activity in the region. An impact scenario shows that the slump in tourism may cause total GDP growth in the Caribbean and Latin America to fall by 8 percentage points and 1 percentage point, respectively, while the total employment rate could potentially decline by 7 percentage points in the Caribbean and 1 percentage point in Latin America. As countries have taken measures to mitigate the impact of the crisis on tourism, recommendations are provided to step up the sector's preparation for the economic recovery, while enhancing diversification as well as environmental and social sustainability.

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<sup>1</sup> According to the Coronavirus Resource Center of Johns Hopkins University, see <https://coronavirus.jhu.edu/data/mortality>. By end-July, these countries included (in decreasing order): Peru, Chile, Brazil, Mexico, Bolivia (P.S. of), Colombia, Guatemala and Argentina.



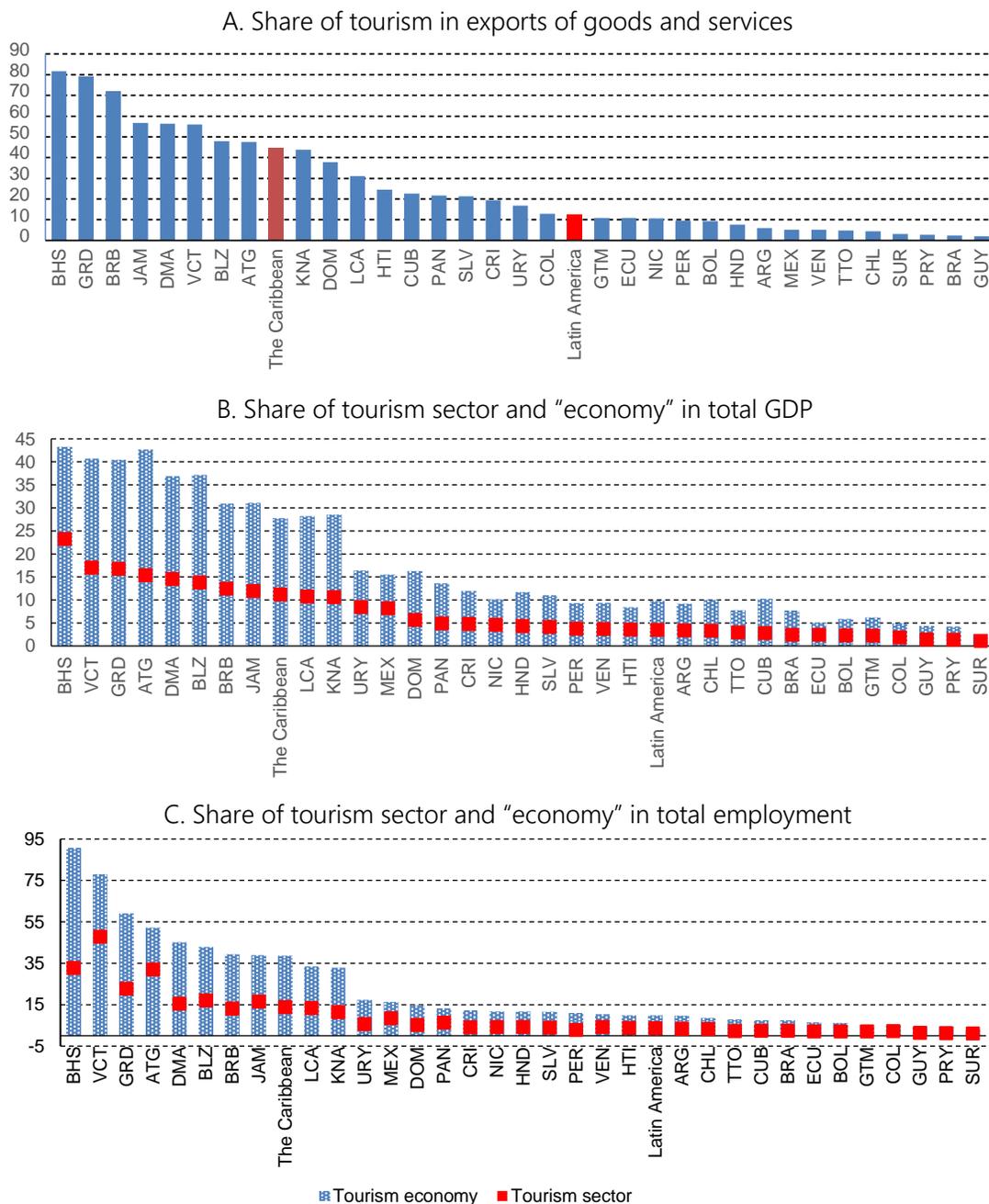
## **I. The key role of tourism in GDP, exports and employment**

Tourism is a key generator of foreign exchange across the region. In 2019, it accounted for 42% and 10% of total exports (goods and services) in the Caribbean and in Latin America, respectively. Its share exceeded 50% in some countries of the Caribbean (see figure 1.A). The tourism sector also represents significant shares of GDP: 11% in the Caribbean and 4% in Latin America in 2019. Again, in some Caribbean countries this share was significantly higher (see figure 1.B). However, as many activities outside tourism depend on this sector, its real contribution to GDP is much larger. According to the tourism satellite accounts of the World Travel and Tourism Council (WTTC), the “tourism economy” is about 2.5 times larger than the tourist sector in the Caribbean. This illustrates that tourism has many backwardly linked sectors, including agriculture, food, beverages, construction, transport, creative industry, and other services. The tourism economy represented 26% of total GDP in the Caribbean and 10% in Latin America (see figure 1.B).

As a service activity, tourism is highly labor intensive, accounting for 17% of direct employment in the Caribbean and 4% in Latin America, while in some countries (Antigua and Barbuda, Saint Lucia, Saint Kitts and Nevis and The Bahamas,) this share exceeded 20% in 2019. Taking into consideration indirect employment in this sector, the share of the “tourism economy” is more than double the direct employment share, particularly in the Caribbean. The tourism economy accounted for 35% of employment in the Caribbean and 10% in Latin America (see figure 1.C).

Tourism drives cities, but in the region, it also contributes to local, coastal, rural and remote communities which have specific advantages, especially in a post-COVID19 recovery scenario. It creates employment opportunities for specialists and professionals, and attracts women, migrants, students and olderworkers; however, it mostly provides lower skill jobs.

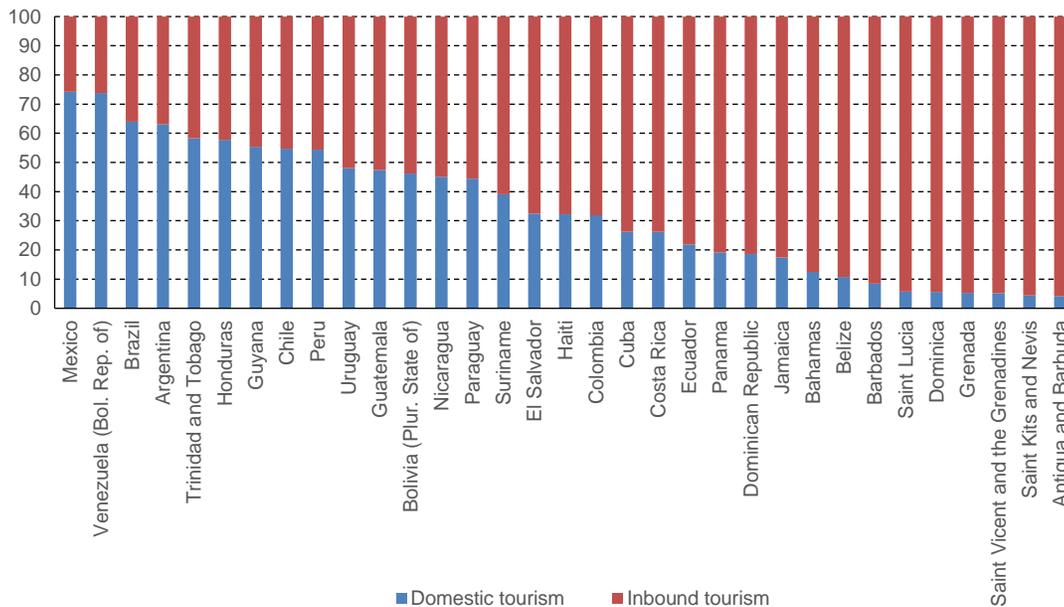
**Figure 1**  
**Latin America and the Caribbean: share of tourism in total exports, GDP and employment, 2019**  
*(Percentages)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of data from the World Travel and Tourism Council (WTTC) and World Bank, World Development Indicators [online] <http://data.worldbank.org/data-catalog/world-development-indicators>.  
 Note: The tourism economy includes both tourism and all sectors that depend on it. The figures for Latin America and the Caribbean are unweighted country averages. The Caribbean includes all the member countries of the Caribbean Community (CARICOM) (except Montserrat), Cuba and the Dominican Republic. ARG = Argentina; ATG = Antigua; BHS = The Bahamas; BLZ = Belize; BOL = Bolivia (Plurilateral State of); BRA = Brazil; BRB = Barbados; CHL = Chile; COL = Colombia; CRI = Costa Rica; CUB = Cuba; DMA = Dominica; DOM = Dominican Republic; ECU = Ecuador; GUY = Guyana; GRD = Grenada; GTM = Guatemala; HND = Honduras; HTI = Haiti; JAM = Jamaica; KNA: Saint Kitts and Nevis; LCA = Saint Lucia; MEX = Mexico; NIC = Nicaragua; PAN = Panama; PER = Peru; PRY = Paraguay; SLV = El Salvador; SUR = Suriname; URY = Uruguay; y TTO = Trinidad and Tobago; VCT = Saint Vincent and the Grenadines; VEN = Venezuela (Bol. Rep. de).

Countries in the region are very heterogenous regarding the relative importance of domestic versus inbound tourism. In the Caribbean, most economies almost completely depend on foreign visitors. In contrast, domestic visitors account for almost three quarters of the total in Mexico, while in some South American countries (like, in decreasing order, Brazil, Argentina, Chile and Peru) this share is above 50% (see figure 2).

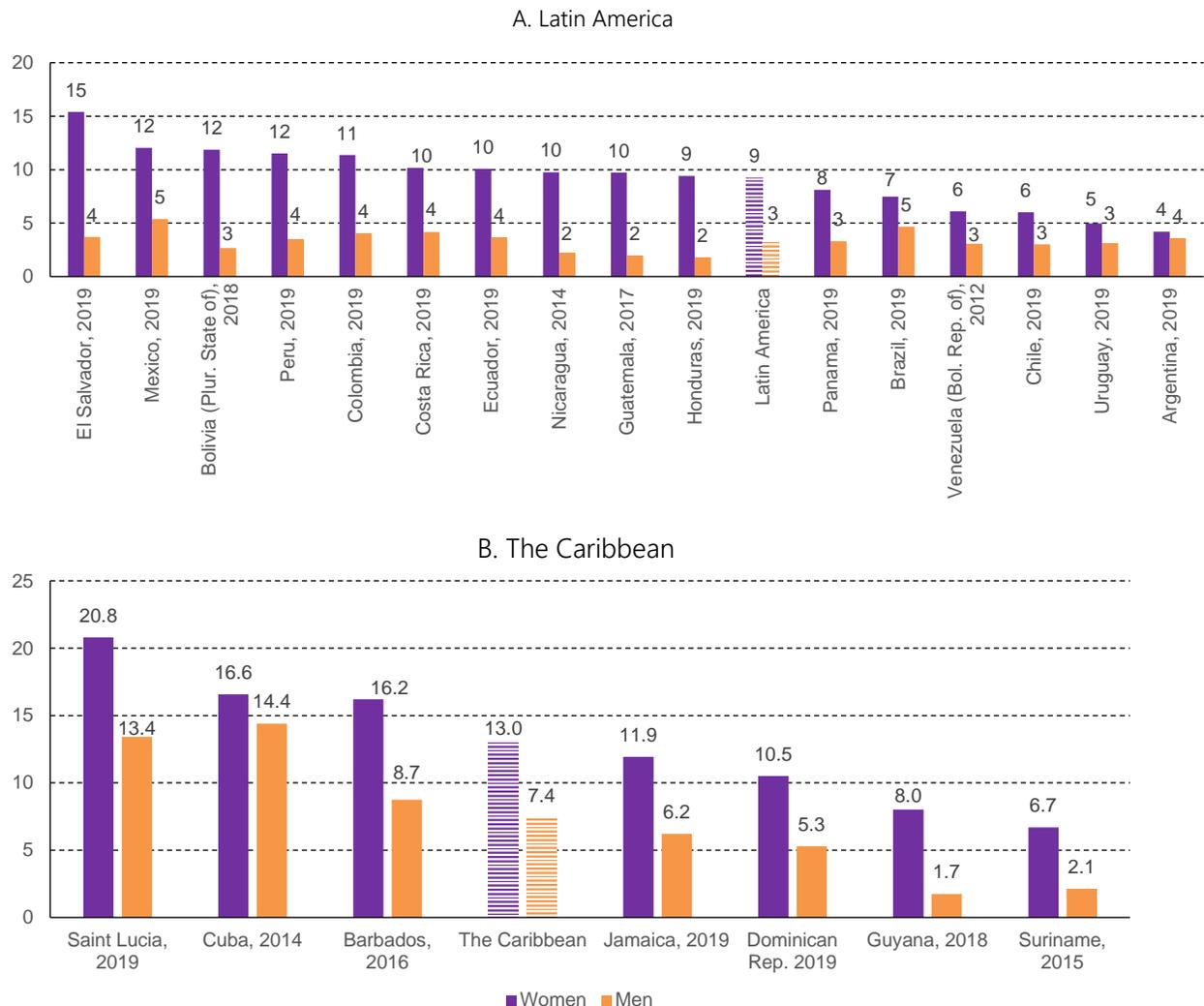
**Figure 2**  
**Latin America and the Caribbean: composition of tourism revenues by domestic and inbound travel, 2019**  
*(Percentages)*



Sources: Economic Commission for Latin America and the Caribbean (ECLAC), based on data from the World Travel & Tourism Council (WTTC).

Tourism offers key opportunities for women by providing flexible working hours and part-time jobs, although gender gaps and unstable working conditions remain. Accommodation and food services represents 9.3% of women’s employment and 3.4% of men’s employment in Latin America (see figure 3.A), and 13.0% of women’s employment and 7.4% of men’s employment in the Caribbean (see figure 3.B).

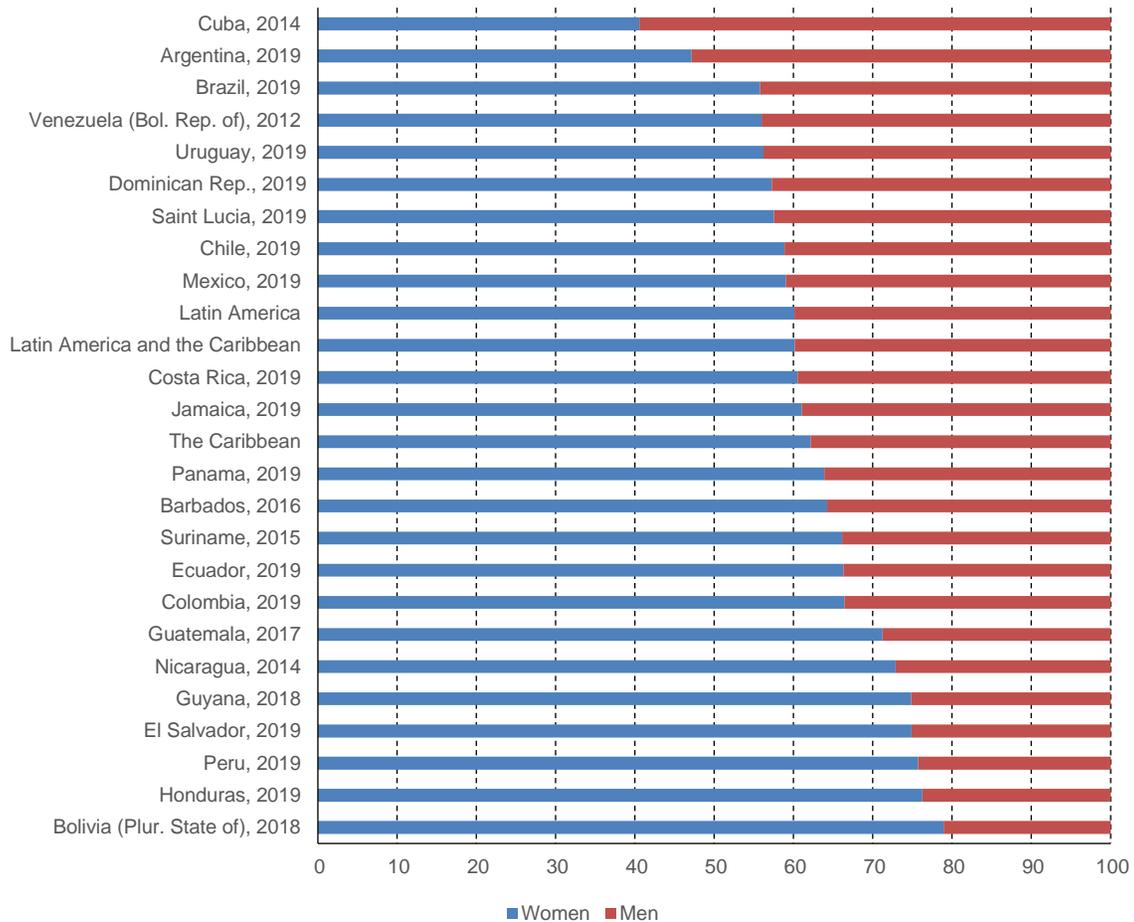
**Figure 3**  
**Latin America and the Caribbean (selected countries): employment in the accommodation and food services sector, by sex, latest year available**  
*(Percentages)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC), based on International Labour Organization. (2020). ILOSTAT database, <https://ilostat.ilo.org/data/>.

Furthermore, women represent almost 60% of employment in accommodation and food service activities in Latin America and 62% in the Caribbean. In some countries this share exceeds 70%, such as Bolivia (79%), Honduras (76%), Perú (76%), El Salvador (75%), Guyana (75%), Nicaragua (73%) and Guatemala (71%) (see figure 4). Although, women are the majority of tourism workers in the region, they are also likely to work in low-level or low-paid employment (UNWTO and UN Women, 2019). In contrast, 51% of tourism businesses are managed by women in Latin America, with cases such as Nicaragua and Panama where that proportion reaches 70% (World Bank, 2017).

**Figure 4**  
**Latin America and the Caribbean (selected countries): employment by sex in the accommodation and food services sector, latest year available**  
*(Percentages)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC), based on International Labour Organization. (2020). ILOSTAT database, <https://ilostat.ilo.org/data/>.

Micro, small and medium-sized enterprises (MSMEs) represent the bulk of tourism firms. For example, MSMEs accounted for 98.7% of tourism-related businesses in Costa Rica and 99.8% in Mexico (Tourism Satellite Account Costa Rica 2016 and Mexico 2018) (BCCR, 2018; INEGI, 2019). These ratios are similar to those of the whole Latin American economy, in which MSMEs account for 99% of the productive system and 61% of employment (Dini and Stumpo, 2018).



## II. The dramatic fall in tourism

The unfolding COVID-19 crisis has caused a major fall in tourism activity around the world including Latin America and the Caribbean. Between 2016 and early 2020, tourist arrivals were growing at around 10% per year in Mexico and the three subregions. However, as the pandemic reached the region and an increasing number of countries closed their borders in March, tourist arrivals dropped by more than 50% in March and close to 100% in April (see figure 5).

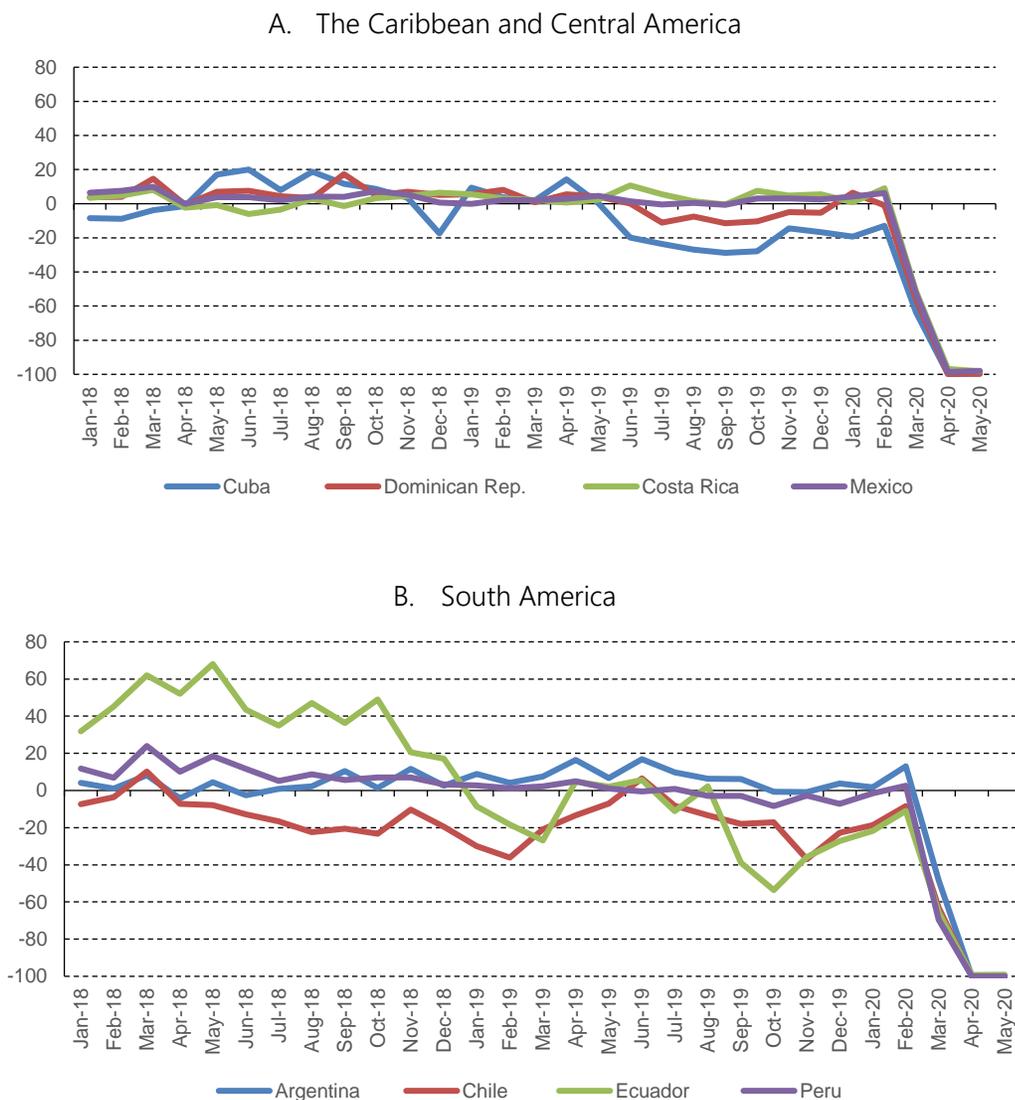
In the Caribbean, the most specialized subregion in tourism, this activity had come to a standstill in April. Of the 20 most tourism-dependent small economies in the world, 13 are in the Caribbean. Tourism depends almost completely on visitors from the United States, Canada and Europe, which have been severely affected by the pandemic. Moreover, most ports and airports have been closed to prevent the entry of visitors with COVID-19. As a result, tourism arrivals have dropped to almost zero, and hotels and resorts have witnessed massive cancellations.

In Cuba, passenger arrivals fell 20%, 13% and 33% in January, February and March, respectively, and to almost zero in April. In the case of the Dominican Republic, the Regional Center for Sustainable Economic Strategies (El Dinero, 2020) projected the losses of tourism under three possible scenarios: high risk (with an expansion of the virus and new quarantine periods), base (where the economy reactivates within 90 days) and with reforms (where the economy reopens faster). Under the first scenario, tourism would experience a drop of 70%, whereas in the third scenario, losses would oscillate around 55%.

Within the tourism sector in the Caribbean, the cruise industry has been hit particularly hard. From 2010 to 2018, this sector was growing by 7.8% per year on average. In 2019, the Caribbean welcomed 38% of the global total of cruise ship passengers and 34% of total cruise ship deployment. However, as the pandemic spread around the world, passenger numbers had dropped to almost zero by mid-March 2020 (Panetta, 2020). Many cruise ships had outbreaks at sea, with

some passengers and crew members dying on board or after disembarking from international trips. This situation made it difficult to find ports to dock after several countries rejected cruise ships suspected of carrying infected passengers, affecting the change of crew members and stranding some ships at sea for weeks. The US State Department has issued a no-sail order in US waters from March 14 until at least July 24, affecting all companies. As a result, the companies had to cancel most voyages or sometimes sail empty ships, with employees facing pay cuts and layoffs. According to a recent Caribbean Hotel and Tourism Association (2020b) survey, intra-Caribbean business and leisure travel is expected to return first, followed by land-based travel from the United States and Canada, then from Europe, being the cruise travel’s return expected to take at least 10 months (Caribbean Hotel and Tourism Association, 2020b).

**Figure 5**  
**Latin America and the Caribbean (selected countries):**  
**annual variations in monthly foreign tourist arrivals, January 2016-May 2020**  
*(Percentages)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC) on the basis of official figures.

It is anticipated that cruise enterprises could return to sail by August or September. Carnival Cruise Lines, for example, plans to gradually resume their services next August with eight ships with stops in the Bahamas, the Cayman Islands, Jamaica and Mexico. The services will be setting off from the ports of Miami, Cape Canaveral and Galveston, Texas which were selected for their accessibility by car to avoid the combination with airplanes. All other North American cruises, like those departing from Seattle and Vancouver, as well as a route from Brisbane, Australia to Hawaii, are cancelled at least until October 6 (Business Insider, 2020).

The projections for the 2021 cruise season are more optimistic. A recent poll to 4,600 cruise customers conducted by the review site CruiseCritic.com showed that 75% of respondents said they planned to continue to book cruises at the same rate as before, after the COVID-19 outbreak is over, compared to 24% who said they planned to book cruises less often. This is also reflected in the behavior of travelers: 76% of the people who had a canceled cruise in 2020 have chosen to accept a credit towards a future cruise in 2021 as opposed to only 24% who requested a refund. Online reservations also show a 40% increase in 2021 cruise bookings compared to 2019. A recent analysis from Swiss bank UBS found that in the past 30 days, the number of cruise bookings for 2021 are up by 9% compared to the same period in 2020, including a substantial number of people booking brand new cruises as opposed to simply re-booking canceled cruises (Business Insider, 2020).

In Mexico, international tourist arrivals were still growing in January and February. However, these started to drop between 40% and 45% in March and plummeted between 91% and 99.5% in April in key tourist spots on the Mexican coast such as Cancun, Los Cabos and Puerto Vallarta. The drop in national arrivals was smaller than that of international ones in March, but similar in April (Anáhuac Tourism Research and Competitiveness Center, CICOTUR website). The Association of Tourism Secretaries (ASETUR) estimates that the tourism revenues could fall between 50% and 80% this year (Deutsche Welle, 2020). The BBVA bank estimated that during the first four months of 2020, tourism revenues sector fell 83.7% (El Heraldo de México, 2020). In June, destinations like Cancun and Los Cabos opened for tourism at an operating capacity of 30% and reached between 10 and 15% capacity in the first week. As 80% of tourists arrive from Canada and the United States and a recovery strategy also targets new markets, the sector is expected to take two years to reach pre-COVID-19 visitation levels (El Economista, 2020).

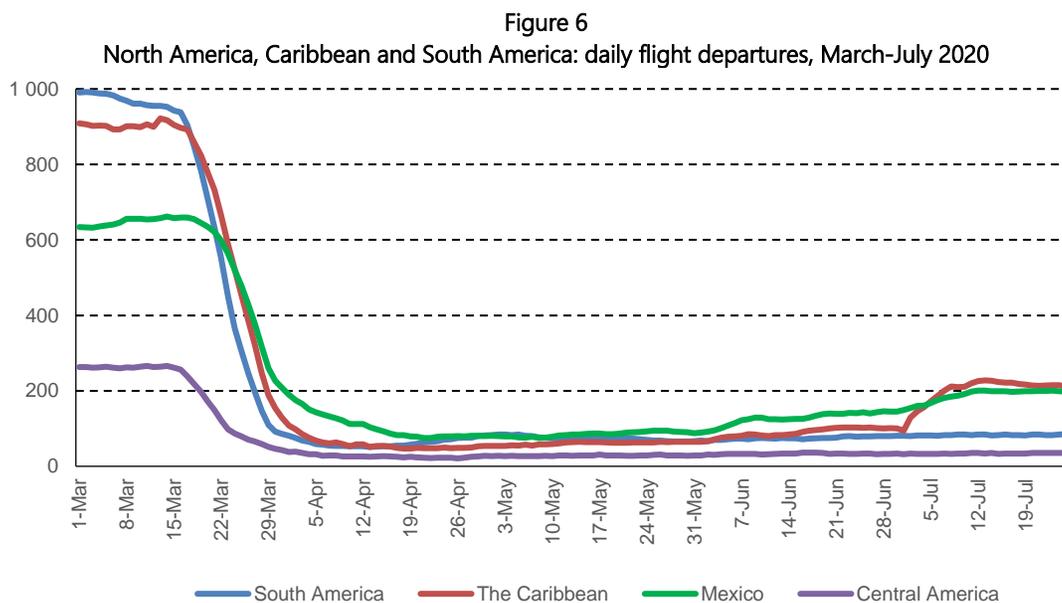
Central America has also been strongly hit. In Costa Rica, the fall of tourism revenues may be 48% in 2020, with job losses of a similar magnitude, while GDP may fall by 2.1 percentage points due to the fall of tourism only (Estrategia y Negocios, 2020a). El Salvador expected between 20 and 25% growth in the tourism sector in 2020; however, now a 25% decrease is projected (Estrategia y Negocios (2020b). In Guatemala, 90% of the travel agencies in the tourism sector have registered 100% cancellations as of May. In the case of hotels, 80% register 0% occupancy, while the rest had a 4% rate (AGEXPORT HOY, 2020).

In Brazil, tourism activity has been paralyzed since the second half of March. In April, consumers cancelled 96% of their planned holidays (Travel2Latam, 2020). A study by the Getulio Vargas Foundation (2020) from April estimates that tourism activity will be completely suspended for at least three months. The following recovery to pre-crisis levels is supposed to take 12 months in the case of domestic tourism and 18 months for foreign visitors. Tourism GDP in Brazil may drop by about 40% in 2020.

In the rest of South America, the impact of the pandemic is also strongly felt in tourism. In Argentina, a survey among travel agencies in April shows that 85% of all bookings have been cancelled until September. For the entire year 2020, 87% of all agencies foresee a very bad year and most foresee that a slow recovery will start between September and December (National Institute for the Promotion of Tourism, 2020). In Chile, tourist arrivals in March dropped 63% compared to the same month last year, while their expenditure fell 51% (Department of Tourism, 2020). In Colombia, travel agencies registered a fall in sales of 70%, although 43% of costumers agreed to postpone instead of canceling their reservations (Hosteltur, 2020). In Peru and Uruguay, tourism arrivals in March dropped 70% and 57%, respectively.

International and domestic flights have also dropped to almost zero. Daily flight departures from airports in the different subregions fell abruptly since the second half of March (see figure 6), as did flight arrivals. Since April, most of the remaining flights have been for cargo or humanitarian purposes. (Latin American and Caribbean Association of Air Transport, ALTA, 2020; International Air Travel Association, IATA, 2020; International Civil Aviation Association, ICAO, 2020). This trend has continued until the end of July, except for Caribbean and Mexico where a slight recovery was observed.

Several of the major regional airlines (such as Avianca, Caribbean Airlines, Copa, Latam and LIAT) (Antigua News Room, 2020a) have ceased operations almost completely, except for some humanitarian and cargo flights, and are seeking government support in the face of heavy income losses. In several countries, international (and to a lesser extent national) flights have been reduced by 99%. Several of the region's major hubs (including Tocumen in Panama and El Dorado in Bogota) have been completely closed serving only humanitarian flights. Only in Asia and the United States, airlines continue to operate some domestic and international flights.



Fuente: Economic Commission for Latin America and the Caribbean (ECLAC) on the basis of <https://www.icao.int/safety/Pages/COVID-19-Airport-Status.aspx>.

International travel has not been affected as much in decades as by the COVID-19 pandemic. This results largely from the increasingly strict travel restrictions imposed since January (UNWTO,

2020b). Countries around the world started by imposing bans or 14-day self-isolation periods for travelers from certain countries with high COVID-19 infection rates, such as China and other Asian countries. Later, these bans were extended to other countries like Italy and Spain. By 28 April, 100% of global destinations had introduced travel restrictions.

In the region, some countries in Central America and the Caribbean were the first to take partial measures to restrict flows of foreign visitors. Guyana, Nicaragua and Panama started screening passengers in the second half of January and February. Other countries, like Barbados, Guatemala and Trinidad and Tobago, imposed self-isolation periods on travelers arriving from high-risk regions. This measure was followed by a ban on travelers from these regions. Finally, towards the end-March and April, most countries banned inbound visitors altogether (see panel A in figure 7). In general, South American countries adopted restrictive measures later than the rest of the region. By early May, almost all countries in the region had banned foreign visitors.

Tourism has also been affected by measures regarding domestic travel in several countries (see panel B in figure 7). While some countries recommended not to move from one place to another within countries, the large majority has imposed restrictions on domestic travel, including by mandating closures in touristic attractions, such as museums, beaches and natural parks. Only Nicaragua had not restricted domestic movements. By mid-July, some Caribbean countries and Uruguay had started to relax some of these restrictions.

Several Caribbean countries began reopening their borders for tourism in June and July. Antigua and Barbuda, Saint Lucia and Jamaica reopened in June, in that order. The Bahamas, Cuba, the Dominican Republic and Saint Vincent and the Grenadines all opened on 1 July, while Barbados, Dominica, Grenada and some other Caribbean territories opened later in July. Numerous other countries in the region plan to reopen to foreign visitors within the next few months. Curaçao, Aruba and Bonaire have resumed air traffic between the islands (Curaçao Chronicle, 2020) and Antigua and Barbuda has for instance established a 'travel bubble' in July that allow citizens from several Caribbean countries to travel to the country without having to present a COVID-19 test and certificates upon entry (Caribbean National Weekly, 2020). This has been replicated in other countries such as Barbados, which has established a travel risk category depending on the country that the traveler has travelled to or transited through within 21 days prior to travel to Barbados (Barbados Government Information Service, 2020a), and Saint Lucia, with the recent campaign 'Bubblecation'(CARICOM Today, 2020c).

These Caribbean countries have implemented a variety of safety protocols to contain the spread of COVID-19 following their reopening's. A Caribbean Tourism COVID-19 task force, which was set up in March, consisting of representatives from the Caribbean Hotel and Tourism Association, the Caribbean Public Health Agency (CARPHA), Caribbean Tourism Organization, Organization of Eastern Caribbean States (OECS) and the Global Tourism Resiliency and Crisis Management Centre is helping member countries to coordinate their efforts in this process with a set of guidelines and training to help countries put protocols in place Barbados Today (2020b).

**Figure 7**  
**Latin America and the Caribbean: restrictions on international and domestic travel, March to July 2020**  
**A. International travel**



**B. Domestic travel**



Sources: Economic Commission for Latin America and the Caribbean (ECLAC) based on Hale and others (2020), "Variation in Government Responses to COVID-19" Version 5.0. Blavatnik School of Government Working Paper. April 29. Available: [www.bsg.ox.ac.uk/covidtracker](http://www.bsg.ox.ac.uk/covidtracker). See also <https://www.bbc.com/news/world-52103747>

Notes: restrictions on international travel: 1 – Screening; 2 - Quarantine arrivals from high-risk regions; 3 - Ban on high-risk regions; 4 - Total border closure; Restrictions on domestic travel: 1 - Recommend closing (or significantly reduce volume/route/means of transport); 2 - Require closing (or prohibit most people from using it). Blank cells at the end of each rows means there is no information. BLZ = Belize; BRB = Barbados; CUB = Cuba; DMA = Dominica; DOM = Dominican Republic; GUY = Guyana; JAM = Jamaica; SUR = Suriname; TTO = Trinidad and Tobago; CRI = Costa Rica; GTM = Guatemala; HND = Honduras; NIC = Nicaragua; PAN = Panama; SLV = El Salvador; MEX = Mexico; ARG = Argentina; BOL = Bolivia (Plurinational State of); BRA = Brazil; CHL = Chile; COL = Colombia; ECU = Ecuador; PER = Peru; PRY = Paraguay; URY = Uruguay; y VEN = Venezuela (Bol. Rep. of).

Most Caribbean countries require proof of a negative PCR<sup>2</sup> test for COVID-19 taken within a few days of travel, and subject visitors to temperature checks and other health screenings on arrival. Cuba, Dominica, Grenada and Saint Vincent and the Grenadines require that visitors take COVID-19 tests upon arrival. Like Barbados, Grenada has implemented different entry requirements based on how the visitor's country is categorized. Visitors from low risk countries (mainly CARICOM countries) are required to take a COVID-19 rapid test upon arrival. Those from medium risk countries (Canada, European Union and United Kingdom) are required to provide negative PCR tests seven days before departure and take a rapid test upon arrival. Visitors from high risk countries (countries with active and widespread transmission) must provide proof of a negative PCR test seven days before departure, take a PCR test upon arrival and remain in quarantine until negative tests are returned. All visitors are also required to download the Grenada contact tracing app before arrival. In the case of Dominica the completion of an online questionnaire is also required at least 24 hours in advance and clearance to travel. Should passengers present COVID signals including a positive test result, they will be quarantined at a government facility or a certified hotel (Caribbean News Global, 2020b). Guyana has also established a series of COVID-19 health checkpoints along its borders (Guyana Chronicle, 2020).

In addition, all Caribbean countries have implemented health measures for the population such as requiring masks in public spaces, including airports, and ensuring social distancing, and reopening hotels have had to implement sanitation and health and safety protocols to keep guests and staff safe. Countries have also employed different methods to keep tourists away from residents. In Saint Lucia, tourists must stay confined to certified accommodations unless in an excursion organized by the hotel. Jamaica has designated a "COVID-19 Resilient Corridor" on the coastline which tourists are restricted to. Only certified businesses within this zone will be allowed to open to tourists. Cuba has limited tourism activity to all-inclusive resorts on five remote islands off its northern coast. Countries are also adjusting to the new reality and developing innovative solution to attract a new set of tourists, such as Barbados with the launch of its 12-month Barbados Welcome Stamp, which offers new opportunities for anyone who wishes to work remotely from the island (Barbados Government Information Service, 2020b). Restarting the tourism sector has not been without challenges. Following a resurgence of new COVID-19 cases, The Bahamas closed the border to commercial flights from the US on 19 July

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<sup>2</sup> Polymerase chain reaction.



### **III. Large drops in regional tourism are expected in 2020**

Estimating the impact of the drop of tourism activity on total GDP is surrounded by enormous uncertainty and depends on several factors. These include the progression of the pandemic, the speed of policy change, behavioral responses of resident and visiting tourists, and the impacts of sustained low levels of activity and higher operating costs on business survival. Furthermore, its recovery will also depend on several factors, most notably on the reactivation of domestic travel before international tourism, as restrictions on the former will be lifted sooner.

For the simplified scenario analysis, monthly tourism flows have been projected for 2020 and 2021, taking into consideration the following factors. First, the recovery of domestic and inbound tourism will likely be different, as restrictions on the former are likely to be lifted sooner than on the latter. Therefore, both must be separated in the projections. Second, it is key to project monthly instead of annual flows due to the strong seasonal movements and the fact that some countries had their peak tourism months before the pandemic. Third, due to the high degree of uncertainty, three scenarios instead of one are simulated. Fourth, as social distancing will be the norm, the tourism sector will not recover completely, but rather converge to plateaus of 40%, 50% and 60% under the pessimistic, base and optimistic scenarios. Fifth, based on previous recovery experiences in tourism from shocks in the region, it seems these take an “S” shape and last on average 9 months. For more details on the estimation method, see box 1. Other authors, like Mooney and Zegarra (2020), have adopted similar impact scenarios. The projected drop in international tourism arrivals is similar to that of the UNWTO (2020a), which estimated a fall in global tourism between 60% and 80% for 2020.

**Box 1**  
**Methodology to estimate the drop in Latin America and the Caribbean's GDP, exports and employment due to the fall in tourism**

The impact of the fall in tourism activity on total GDP, exports and employment is estimated as follows. Tourism is split between domestic and inbound (from abroad) activities, based on WTTC's satellite accounts, as the recovery of the former is supposed to be swifter than that of the latter. Domestic tourism often does not require air travel, and restrictions on domestic travel are likely to be relaxed sooner than those on the arrival of foreign visitors.

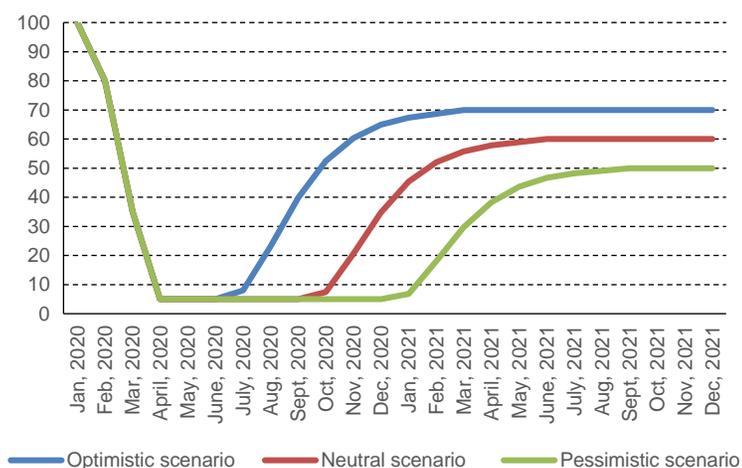
(a) Inbound tourism: (i) monthly international tourist arrivals are projected up to December 2021 using long-term trends; (ii) official data are used for arrivals between January and March 2020 (where available). International tourist arrivals are projected to drop 95% in April 2020 and stagnate for several months at least according to the three scenarios. The subsequent recovery is expected to take around 9 months, before reaching plateaus of 50%, 60% and 70% depending on pessimistic, base and optimistic scenarios, respectively (see table and figure below). The impact on total exports and GDP is estimated by multiplying the percentage difference in arrivals between the baseline forecast and recovery projection weighted by the share of inbound tourism in total exports and GDP, respectively.

**Table 1**  
**Three possible scenarios regarding the recovery of external tourism activity in 2020**

Recovery scenario	Assumptions	Projected fall in visitor arrivals in 2020
Optimistic	The lockdown period of near zero arrivals continues until June 2020. Countries get the pandemic under control and from July onwards tourists gradually return to 70% of the level forecasted at baseline over a period of 9 months.	-52%
Base	The lockdown period of near zero arrivals continues until September 2020. Most countries get the pandemic under control and from October, arrivals gradually return to 60% of the level forecasted at baseline over a period of 9 months.	-67%
Pessimistic	The lockdown measures are lifted in September, but countries have not gotten the pandemic under control. This opening would be followed by a second wave of infections, intensified by falling temperatures in the Northern Hemisphere. Travel restrictions are then re-implemented and last until December 2020. Beginning in January 2021, arrivals gradually return to 50% of the level forecasted at baseline over a period of 9 months.	-72%

Source: Economic Commission for Latin America and the Caribbean (ECLAC).

**Figure 1**  
**Recovery of international tourist arrivals: three possible scenarios, 2020-2021**  
*(Per cent of baseline forecast)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

Box 1 (concluded)

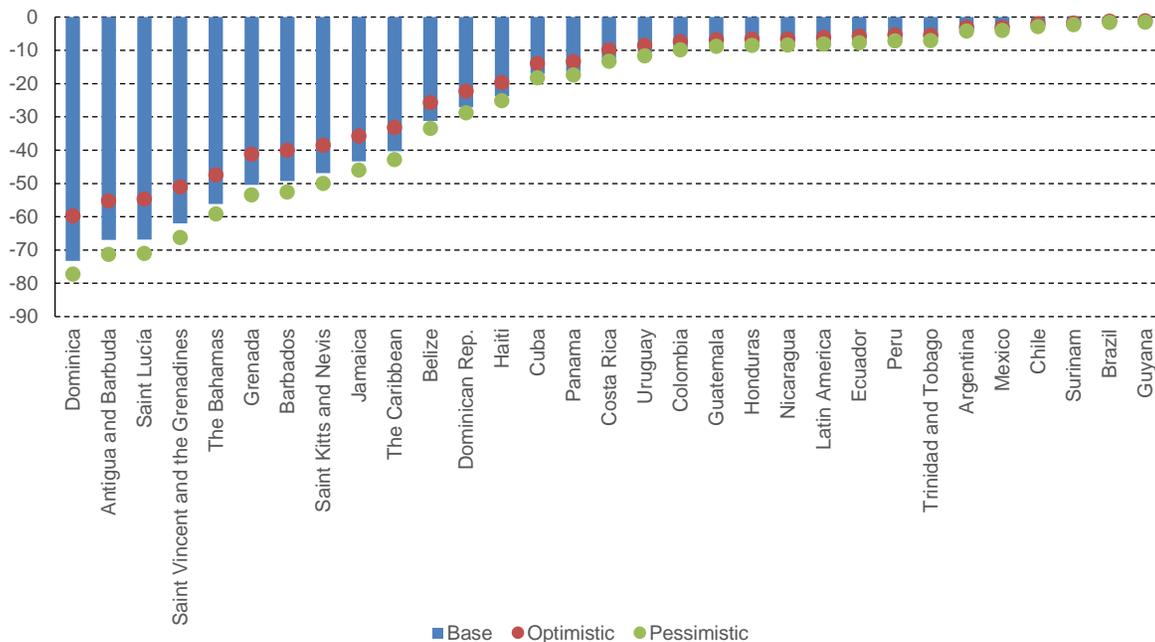
(b) Domestic tourism: as January and February was the peak season for this segment in South America, it will be less affected than the rest of the region. It is assumed that domestic tourism activity (in terms of GDP) in the base scenario will fall 50% relative to its 2019 level in South America and 60% in the rest of the region. The optimistic and pessimistic scenarios assume a drop of 20 percentage points below or above the base scenario, respectively.

(c) Potential employment loss is estimated using country-specific regressions of the relationship between employment trends and the growth cycle in tourism (Okun’s law), see Kandil and others (2014). These provide employment-to-GDP elasticities, which, in turn, are applied to GDP losses. The employment estimates are upper bounds, as these do not take into consideration mitigation measures implemented by governments throughout the region.

Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of Kandil and others (2014), “Labor market issues in the Caribbean: scope to mobilize employment growth”, IMF Working Papers, No. WP/14/115, Washington, D.C., International Monetary Fund (IMF).

Under these scenarios, six Caribbean economies may face losses of over 50% of their 2019 level of exports of goods and services, while another seven could face losses of over 20%. For these Caribbean countries, the loss in tourism revenues will strongly curtail their capacity to import necessary goods and services (Coke-Hamilton, 2020). The relative export losses are expected to be smaller for Mexico and Brazil (see figure 8), in part because tourism depends much more on domestic tourists, rather than international arrivals. However, travel restrictions have also paralysed domestic travel, hitting these countries hard.

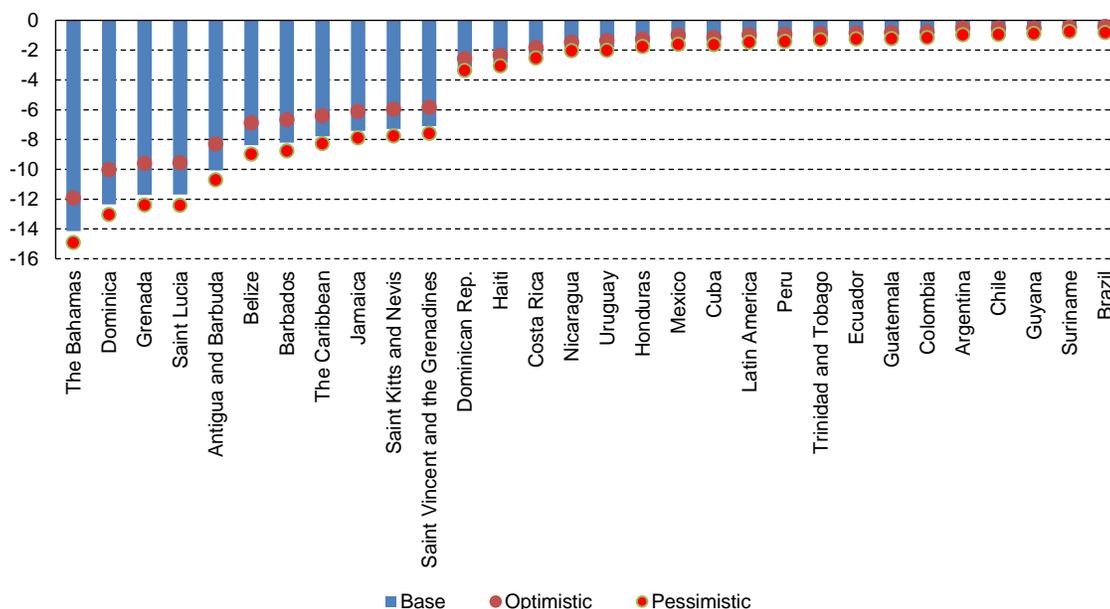
**Figure 8**  
**Latin America and the Caribbean (27 countries): impact of the downturn in tourism on exports of goods and services under three scenarios, 2020**  
*(Percentages)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

These steep falls in tourism revenues are likely to have a significant impact on overall GDP growth. In four Caribbean economies, the tourism crisis could reduce GDP by at least 10 percentage points, while in six others GDP could be cut by more than 6 points. Using slightly different assumptions, Mooney and Zegarra (2020) expect the crisis to have a similar impact on the GDP of these Caribbean economies. For all the South American economies analysed, the impact is expected to be below 2 percentage points, with Brazil seeing the smallest drop in GDP (see figure 9), owing to the relatively small weight of the sector in the overall economy.

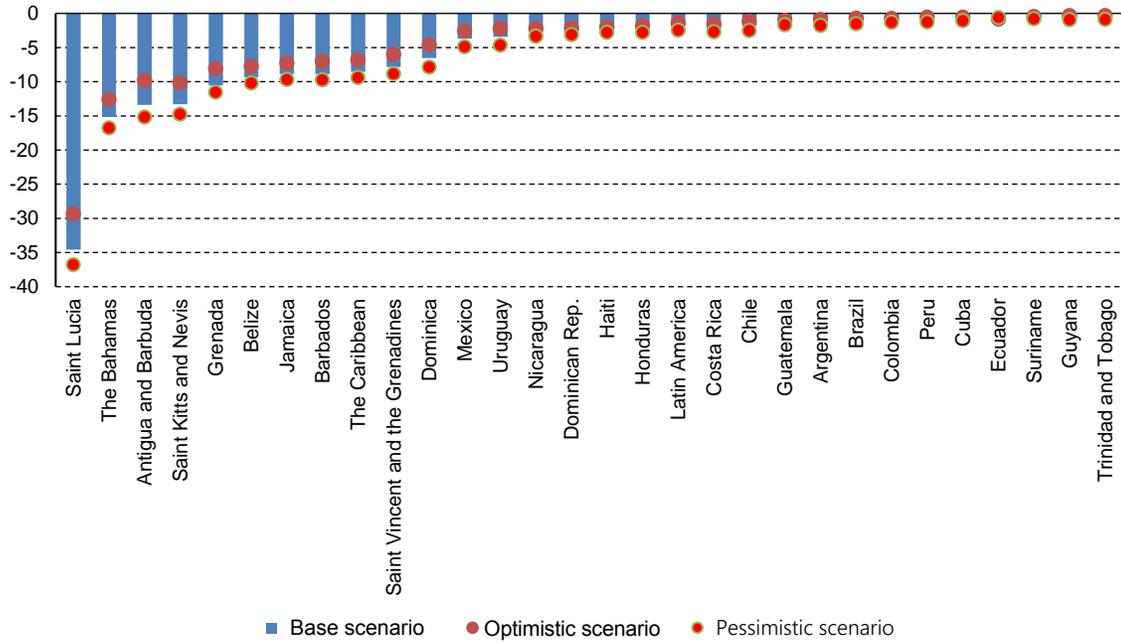
**Figure 9**  
**Latin America and the Caribbean (27 countries): impact of the downturn in tourism on total GDP under three scenarios, 2020**  
*(Percentage points)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

The public health and economic crises are also expected to adversely affect employment in the tourism sector, particularly if the return of both domestic and international visitors is slow. According to the base scenario, which does not take into consideration the mitigation measures currently being implemented by all governments across the region to protect businesses and jobs, total employment may be reduced by 7 percentage points in the Caribbean and 1 percentage point in Latin America (see figure 10). In the Caribbean, Antigua and Barbuda, Saint Kitts and Nevis, Saint Lucia and The Bahamas may suffer a total employment loss of 15 percentage points or more under the pessimistic scenario. Within Latin America, Mexico is expected to see the biggest drop in employment.

**Figure 10**  
**Latin America and the Caribbean (28 countries): impact of the downturn in tourism**  
**on total employment<sup>a</sup> under three scenarios, 2020**  
*(Percentage points)*



Source: Economic Commission for Latin America and the Caribbean (ECLAC).

<sup>a</sup> These are upper bound estimates that do not take into consideration the mitigation measures implemented to curb employment losses in the tourism sector.



## **IV. Different measures can mitigate the impact of the crisis and accelerate recovery**

Countries in the region have taken various measures to mitigate the pandemic's economic and social impacts on tourism and prepare the sector for recovery. As one of the hardest hit activities and most intensive in jobs for vulnerable groups such as the young and women, this sector needs specific mitigation and support measures. These measures should not only address the survival of the sector, but also ensure its preparedness to contribute to the economic recovery once the crisis is over and its resilience to future shocks. ECLAC has developed the COVID-19 Observatory to follow-up on the measures taken by the countries of the region, including on tourism<sup>3</sup>.

This section reviews some measures taken by countries, as well as recommendations for a sustainable and resilient recovery. Based on OECD (2020) and UNWTO (2020a), these initiatives are classified in five categories: protection of workers; support for business survival (particularly MSMEs) along the tourism value chain, facilitation of short-term recovery, and medium-term sustainability and resilience; and promotion of cooperation.

### **A. Job, income protection and training of workers**

Many countries have adopted fiscal packages to provide temporary income support to individuals working in the formal, and in some cases in the informal sector (Brazil and Jamaica with the COVID-19 relief for informal sector) and business owners across the economy. Other forms of income support are permissions to withdraw a certain share of accumulated individual pension accounts (Peru). In some countries, measures have been introduced to prevent firms from firing workers during a certain period (Argentina, the Bahamas with tax credit and tax deferral employment retention programme and Jamaica with the COVID Allocation of Resources for Employees (CARE) programme including the COVID-19

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<sup>3</sup> For the complete list of measures, please visit: <https://www.cepal.org/en/topics/covid-19>.

tourism grants<sup>4</sup> including with reduction of corporate income tax rate (Saint Kitts and Nevis) (Saint Kitts & Nevis Observer, 2020), or allow employers and employees to reach agreements on reductions in work time and pay to avoid dismissals (Costa Rica). Bahamas has also provided benefits for tourism workers who have been placed on short work weeks, self-employed tourism workers, National Insurance Board (NBI) registrants eligible for sick benefits or unemployment benefits and Small Businesses who wish to access the Business Continuity Loan Program. For the self-employed: a temporary programme was designed to assist self-employed persons affected by COVID-19 and individuals received weekly payments of B\$200 for a period of up to 8 weeks.

Other countries (like the Dominican Republic, Mexico and El Salvador) have sent workers over 60, pregnant women or those with certain diseases home maintaining their wage. In some countries, hotels and tourism associations have provided a relief benefit which consisted of a cash relief payment to employees and handed out packages with food and other basic needs for tourism workers, such as in Antigua and Barbuda (Antigua News Room, 2020c) and in the Bahamas.

Through public-private partnerships, governments in some countries have facilitated the transfer of tourism workers to other industries requiring additional support staff in the context of the pandemic response, such as cleaners in hospitals and businesses, temperature checkers and contact tracers.

Employment in this sector is characterized by high levels of informality and atypical work, such as part-time, temporary, casual, seasonal, self-employed and independent work. These flexible jobs help business adjust to the sector's strong seasonal fluctuations, while achieving a better work-life balance for some workers. However, they have also contributed to increasing job precariousness and instability. In Mexico, more than half of the accommodation, food and beverage businesses are informal, while informal workers earn 40% less than their formal counterparts (OECD, 2017). Workers carrying out essential tasks and first line customer service employees have proven to be indispensable to the sector, but the emergency has also highlighted their vulnerability. Therefore, recovery plans must be based on the principle of decent work, including regulation of labor and health rights of workers dependent on transport and accommodation platforms (gig economy).

As women make up most of the tourism workforce, it is recommended to establish measures to address this group with specific support. The (temporary) closing of tourism-related companies has strong repercussions on women's economic autonomy, as they are overrepresented among the poor and face barriers to fully engage in paid jobs. Measures should be adopted to support the formalization of informal workers in tourism, with a special focus on the most vulnerable ones: Afro descendent, grassroots organizations, and rural and young businesswomen. In The Bahamas, Belize, Grenada, Jamaica, Saint Lucia, Saint Vincent and the Grenadines, governments have introduced temporary income or unemployment benefits for self-employed and cash transfers to workers in tourism mostly benefitting female workers. For instance, in Saint Vincent and the Grenadines, sex-disaggregated data tracking the effectiveness of measures indicates that 60% of the beneficiaries of the programmes and benefits established by the Government are women, and that 66% are under the age of 44<sup>5</sup>.

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<sup>4</sup> <https://www.facebook.com/FinanceBAH/videos/tax-credit-and-tax-deferral-available-exclusively-for-payroll-support-at-larger-/217420906337336/>.

<sup>5</sup> [Http://health.gov.vc/health/images/PDF/stories/Ministerial\\_Statements\\_COVID-19\\_Recovery\\_And\\_Stimulus\\_Package.pdf](http://health.gov.vc/health/images/PDF/stories/Ministerial_Statements_COVID-19_Recovery_And_Stimulus_Package.pdf).

To improve job protection and welfare in the medium term, governments could promote the creation of unions or co-operatives to protect workers' rights (OECD, 2016), as well as the implementation of ILO (2017) guidelines on decent work and socially responsible tourism.

Many public and private tourism agencies are organizing training webinars to promote information technology (IT) and digital skills, entrepreneurship, and digital marketing, among other themes (Chile, Colombia, Costa Rica). The Guyana Tourism Authority and the Tourism and Hospitality Association of Guyana signed an agreement for the development of an industry database and the enhancement of training and capacity building initiatives for sector members. Other countries are developing incentive packages for businesses to adjust and reinvent themselves to adopt new business models involving different customers. The Cayman Islands is in the process of adopting such package in order to help Caymanians working in the tourism sector to retrain and gain other skills to adjust or move into new areas (Cayman Compass, 2020). Some (international) organizations have developed (free) online training materials for businesses and workers, such as the UNWTO Tourism Academy<sup>6</sup>.

## **B. Support business survival (particularly MSMEs) along the tourism value chain**

Measures to support business survival include temporary exemptions for payment of income or value added tax (VAT) (Argentina, Colombia) or social security contributions (Chile, Colombia, Jamaica with the COVID-19 Relief Packages for Small and Medium-sized enterprises (SMEs) and Peru) (Zarrilli and Aydiner-Avsar, 2020), as well as credit lines (Ecuador) or subsidies (Guatemala) for working capital and (partial) wage payments for MSMEs and/or large firms (The Bahamas, Barbados<sup>7</sup>, Brazil, Colombia, Costa Rica and Jamaica). In Brazil, the government provides an 85% guarantee for loans up to 36 months with a grace period of 6 months. In Ecuador and Panama, firms may postpone payments for electricity and water bills for 12 and 4 months, respectively.

In Trinidad and Tobago, SMEs can apply for a subsidy for construction and renovation work. In Grenada, Cayman Islands and Montserrat, soft loan programs, grants and relaxation of access requirements to credit have also been offered. In Jamaica, in addition to the Business Employee Support and Transfer of Cash Program to registered businesses operating within the tourism industry, and the COVID-19 Tourism Grant, the Government has announced a six-month moratorium on the payment of licenses and fees by entities in the tourism sector, including resort cottages, apartments, guesthouses, car and bike rentals, craft traders, domestic tours, among others (Jamaica Observer, 2020).

Access to credit is critical for tourism firms' survival in the current context. As women are over-represented in tourism MSMEs and face greater barriers to access to financing, it is critical to ensure women's access to funds, fiscal stimulus packages, loans and public procurement as part of tourism recovery strategies.

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<sup>6</sup> For more information, see <https://www.unwto-tourismacademy.ie.edu/>.

<sup>7</sup> The MSME Fund -FundAccess, an agency under the Ministry of Small Business, Entrepreneurship and Commerce. This Fund will now contribute \$500 per month per employee up to five employees, where that employer is registered both at the Small Business Association (SBA), the Barbados Revenue Authority (BRA), and the National Insurance Scheme (NIS). <https://gisbarbados.gov.bb/blog/wage-fund-to-aid-micro-small-businesses/>.

In addition to emergency support, tourism MSMEs need assistance to improve their digital skills to facilitate interaction with potential customers and take advantage of e-commerce. Booking platforms and social media have allowed tourist providers to interact directly with their customers, eliminating intermediaries and reducing entry barriers. Furthermore, 27% of Millennials posted about a potential trip on social media to obtain opinions before committing, while 36% of Generation Z have booked a destination after seeing other user's media posts (OECD, 2018). Hence the importance of improving interaction between MSME and tourists.

Digital skills entail more than social media communication as innovative technologies flourish. Big data can help track consumer behavior and forecast demand, while artificial intelligence can customize trips for tourists who seek authentic experiences. Virtual and augmented reality could allow access to fragile archeological sites or improve country branding and marketing. The use of virtual tours has helped museums stay opened during the emergency, such as the increase of virtual tours of the Louvre Museum from 40,000 to 400,000 visits during the pandemic.

Blockchain is increasingly used as a payment method as it solves issues of currency exchange and security. Smart cities and the Internet of Things can help simplify mobility, ensure comfort and connectivity, and boost energy efficiency. The potential of these technologies to help diversify and sophisticate the touristic offer is immense but MSME face technical, managerial and financial difficulties tapping these benefits. Capacity building and access to finance are crucial. It should be noted that the adoption of these technologies will depend on the capacity and stability of telecommunications infrastructure and services, especially in rural areas.

## **C. Facilitating the sector's short-term recovery**

Starting up tourism again after the pandemic will be challenging. Even though destinations may be objectively safe, many risk-averse travellers may seek to avoid exposure to COVID-19 and decide not to travel at all or to travel only short distances, avoiding air transport. Different measures can be taken to regain their trust.

The most urgent is the adoption of preventative measures to minimize the spread of the virus or potential subsequent waves of infection. In this context, the Caribbean Hotel and Tourism Association (2020a) recommends the following measures: daily temperature checks for all employees, room purification, increase health safety training for all (front-line) staff, elevated training for cleaning of guest rooms and public areas, establish new cleaning procedures, and implement social distancing practices in public areas. Another measure is the review and adjustment of all areas with shared equipment and guest facilities, to place new informational safety tips and materials, such as face masks, disinfectant kits for guests, among others.

In several countries, Health and Tourism Ministries, Technical Standards Institutions and the private sector are collaborating to define new protocols to minimize the risk of COVID-19 contagion. For example, in Antigua and Barbuda and Jamaica a multi-stakeholder 'Tourism Recovery Task Force' has been established (Antigua News Room, 2020b; Jamaica Observer, 2020). In Costa Rica, the Tourist Institute has published specific protocols for accommodations, transport, national parks and other attractions (Costa Rican Tourism Board, ICT, 2020). In Spain, similar protocols have been

defined<sup>8</sup>. The private sector has established its own health certifications, including Accor, Bureau Veritas (hotels and restaurants), AENOR (Iriarte Ahan, coordinador, 2020) and WTTC.

To manage tourist flows and avoid the concentration of large groups of visitors, the use of big data analysis and artificial intelligence may be helpful. Contact tracing apps, such as those used in several Asian countries, can be employed to notify users when they have been in contact with someone who tested positive for COVID-19, or to monitor persons who are under quarantine in accordance with international human rights standards to respect and enforce data protection and privacy.

Tourism service providers may need loans to upgrade facilities/equipment to meet health and social distancing standards. Support from regional and international financial institutions through grants and low-cost loans can provide the necessary resources to make such upgrades and increase attractiveness to visitors. Such initiatives should target small, locally owned tourism service providers given their high vulnerability to business failure because of the pandemic.

The collapse of the international arrivals has highlighted the need for diversification and led several countries to promote domestic tourism to build resilience to shocks. In Mexico, domestic tourists contribute 83% of the sector's revenues (INEGI Tourism Satellite Account, 2018). Therefore, the government will invest 13.2 million dollars to promote travel experiences and brands in the country's 32 States (Secretariat of Tourism, 2020), while the private sector seeks to kickstart the sector promoting weekend trips (Buen Fin Turístico) (Forbes, 2020). The country's three-tier international strategy also targets special groups, including youth, families, couples, business, luxury, LGBTI, and baby boomers. In Costa Rica, domestic tourism is expected to kick-start the industry as residents account for 54% of visits to national parks (Una Comunica, 2020). Another option to promote domestic tourism demand is the provision of vouchers or discounts to lower income families or elderly (Chile). Comprehensive domestic tourism strategies must consider affordable, reliable and safe transportation options.

The promotion of domestic tourism has a dual function of reactivating the economy while recognizing the importance of access to leisure for everyone. Recently, domestic tourism has grown strongly as its cost has been reduced thanks to the sharing economy (like Airbnb), which has benefitted particularly lower-income consumers (Fraiberger and Sundararajan, 2017). The adoption of self-isolation measures creates opportunity to develop satellite towns around the main touristic destinations. It is also possible to consider directing tourists to certain areas; for example, promote peri urban areas for business and MICE tourism; manage visitation to beaches and parks depending on the community's carrying capacity; or start by opening areas with better healthcare facilities, among other niche opportunities. It should be noted that self-isolation measures will be temporary, therefore, longer term strategies must be designed to ensure the sustainability of the towns, including domestic tourism and long-term visitors.

In addition, changes in the workplace could enable new forms of tourism, especially longer-term stays. Large tech companies have already transitioned to permanent work from home schemes, and a survey among CFOs in the United States indicates that 25% expect over 50% of their workforce to work from home permanently (CRN, 2020). Other flexible schemes are also sprouting, providing workers with flexibility to work remotely while traveling. A "Work and Play"

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<sup>8</sup> Spain has developed special guidelines for different types of tourism establishments. For more information, see the Ministry for Industry, Trade and Tourism (2020).

scheme to attract long-term visitors could boost local development by reactivating rural areas, creating touristic clusters, and improving telecommunications, energy and transportation infrastructure. In general, it will be crucial to innovate business models to boost the industry's recovery, especially by taking advantage of the opportunities offered by digitalization.

Several countries have undertaken special marketing campaigns to attract new visitors soon. The Anguilla Tourist Board implemented a social campaign #AnguillafromAfar and #DreamingofAnguilla (The Anguillian, 2020) as well as Aruba with the "Open for Happiness campaign"<sup>9</sup> with its Health and Happiness Code for a safe environment- The Belize Tourism Board realized a new virtual postcard campaign titled "Dear Belize" to spark wanderlust and inspire future travel, following the pandemic (One Caribbean, 2020)., The Caribbean Tourism Organization (CTO) recommends countries to promote the region as a destination for health and wellness (Barbados Today, 2020a). To support the sector's recovery, the CHTA (2020c) has created a webpage to share experiences and promote tools and resources. The Caribbean should strategically brand and market itself as a region that has been able to better contain the spread of the virus to capture share of "pent up demand" in the sector from more affected regions. Mexico's Secretary of Tourism published a promotional video to convey the strength of the country as a tourism destination.

International marketing strategies should target those groups likely to travel first. These include luxury and business travelers, who can more easily adopt social distancing. Another group is Generation Z: a poll in the United States among these youngsters found that 27% would be willing to travel as soon as restrictions are lifted and 21% a few months after; and 15% would resume international travel once the vaccine is out. Only 37% would probably not travel in the short term (CNBC, 2020). Using online tools, the Gen Z looks for unique, customized and sustainable experiences, favoring cultural, natural, gastronomic and rural tourism. This latter category allows for social distancing and contributes to sustainable and resilient tourism.

In this context, tourism reaffirms its importance as a component of a new rurality in Latin America and the Caribbean as it offers an engine for local development. Furthermore, there is a wave of rural and ecotourism that could be boosted by needs of social distancing. It is estimated that 66% of travelers are willing to pay more for a sustainable product, increasing to 73% among Millennials; 49% considers social issues when choosing a destination, and 58% would not travel if it affected the host community (OECD, 2018). In this sense, tourism may contribute to the improvement of rural roads, increasing the quality of life of local people, allowing better mobility and stimulating economic, social, political and cultural activities.

Some of these strategies can be more easily implemented if tourism businesses operate within public-private clusters. Firms organized in clusters have strategic advantages to address the immediate challenges of the pandemic and define reactivation agendas. Clusters are a geographic concentration of interconnected businesses, suppliers and other institutions with strategic agenda for business upgrading and sophistication (see Box 2 for more details). In Colombia, for example, there are 18 tourism clusters in different segments including nature, business, health, and culture.

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<sup>9</sup> [www.arubatoday.com/aruba-tourism-authority-we-are-open-for-happiness/](http://www.arubatoday.com/aruba-tourism-authority-we-are-open-for-happiness/).

**Box 2****Advantages of tourism clusters to define reactivation and mid-term strategies**

Using short, medium and long-term strategies, clusters can respond quickly to changes in customer behavior by adapting sales' strategies, facilitate product and process innovation, coordinate production, purchasing and financing, adapt to changes in the local and global supply chains, define and organize human resources in financing, react to competitors, organize online and other distribution channels, and promote the internationalization strategy and global presence.

Short-term agendas must consider the capacity of businesses to implement reactivation agendas, the speed of consumer responses, risks of new outbreaks, and medium-term opportunities arising from changes in the value chain, consumer behavior, marketing channels and other trends. In the current crisis, tourism clusters should focus their efforts on:

- Focus on those niche products that provide most value for the reactivation, recovery and protection of future risks through strengthened competitive positions;
- Using digital media to reinforce the positioning, promotion and commercialization of tourism destinations and products;
- Bring the tourist experience closer to international tourists using multiple (digital) formats to generate a potential demand for reactivation;
- Promote the online distribution of the local culture through gastronomy, dance, books, stories, guides, immersive 3D, series, and films;
- Promote intercluster digital, including video games, augmented reality, entertainment, digital guides;
- Develop a post pandemic safe destination promotion strategy with the implementation of scientifically validated protocols;
- Adapt services to national customers as the first target markets for reactivation;
- Instead of a race to the bottom and overcrowding strategy, focus on sustainability.

Source: Economic Commission for Latin America and the Caribbean (ECLAC), based on Cluster Development Colombia, <https://www.cluster-development.com/>.

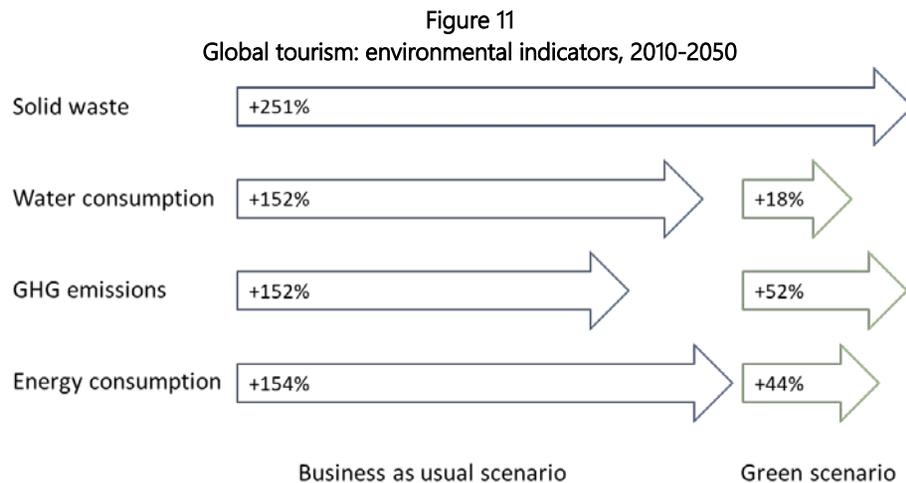
## **D. Promotion of the sector's medium-term sustainability and resilience**

This crisis is an opportunity to increase the contribution of tourism to reach the 17 Sustainable Development Goals (SDGs) of the 2030 Agenda for Sustainable Development. Efforts of other international commitments could also be stepped up, such as the Small Island Developing States (SIDS) agendas, including the Accelerated Modalities of Action (SAMOA) Pathway. Only 10 years remain for countries to meet the objectives of the 2030 Agenda. In this Decade of Action, tourism is a key sector that contributes directly or indirectly to all goals, particularly SDGs 8 (decent work and economic growth), 13 (climate action); 14 and 15 (life below water and on land).

The mitigation measures currently being implemented for the tourism sector in the context of the pandemic could be used to improve its environmental and social sustainability. This sector contributes approximately 5% of global greenhouse gas emissions (GHG), with transport accounting for almost three quarters, followed by accommodation (one fifth). Tourism may generate substantial environmental damage under a business as usual scenario. However, taking the necessary measures to "green" this sector, its impact could be reduced considerably (see figure 11) (OECD, 2018).

Tourism relies on natural ecosystems for its functioning (water, energy, agriculture and the attractiveness of the landscape), but also contributes to their depletion. Therefore, it is greatly

affected by climate change and natural disasters<sup>10</sup>. From 1972 and 2010, wholesale and retail trade, different types of services and agriculture were most the affected activities from these extreme events (Bello, 2014). This tension demands a transition towards greater sustainability to alleviate pressure on water, improve energy efficiency, protect biodiversity, optimize relations with the agriculture sector and build resilience to disasters, as tourism grows steadily.



Source: OECD (2018), "Analysing Megatrends to Better Shape the Future of Tourism", OECD Tourism Papers, No. 2018/02, OECD Publishing, Paris.

Opportunely, climate change and disaster risk management share a resilience-building agenda, offering an opportunity for improved investments and financial management. In addition to improving collaboration and integration among sectors and institutions, a climate—and risk—sensitive approach would improve financing and focus on supporting investments that make wider contributions to sustainable development. Comprehensive planning processes that consider both issues are expected to be more efficient in the use of resources and to have multisectoral/overreaching societal benefits, as well as to be more sustainable and integrated with other sectors (water, energy, transportation, public infrastructure, agriculture, and planning, among others).

As the COVID-19 pandemic evolves, new disaster risk management challenges will arise. However, it is also important to insist on the importance of overcoming some lingering threats. Most notably, physical exposure. Businesses focused on natural attractions tend to be in proximity of shorelines, volcanoes and rivers. It is expected that demand for these activities will continue as trends move toward natural destinations, and social distancing will become part of the new normal. Therefore, disaster risk reduction measures must be strengthened. It is necessary to design zoning plans that include evacuation and other safety criteria for local inhabitants and tourists. Building codes should consider local threats and environmental conditions to identify adequate construction methods and building materials. In places where infrastructure has already been developed, it is recommended to retrofit hotel infrastructure to withstand effects of the most common natural

<sup>10</sup> Between 1970 and 2019, Asia was affected by 39.5% of the disasters registered in the world, followed by Latin America (16.6%). South America was the most affected subregion (47.3%), followed by Central America (30.6%) and the Caribbean (22%) (Centre for Research on the Epidemiology of Disasters, 2019).

threats. Protective infrastructure, such as dykes and seawalls, should be accompanied by green responses, such as mangrove restoration and riverbed reforestation.

Business continuity is also affected by the effects of the disaster in other sectors, such as water shortages, and energy and telecommunications interruptions. Especially in rural and isolated areas, it is recommended to decentralize energy provision by relying on local renewable sources. Besides providing redundancy with national systems, it would promote a transition to a sustainable grid and reduce sectoral GHG emissions.

Financial exposure also affects the sector, especially considering that most tourism providers are MSMEs. In general, this group of firms in the region face obstacles accessing financing due to inadequate banking products and companies with weak managerial and financial skills and knowledge. Furthermore, during the assessment of disasters in the Caribbean, it has been observed that un- and underinsurance are widespread in the tourism sector. It is recommended to establish group or activity insurance schemes that attract more MSMEs and ease insurance conditions. In the tourism sector, these measures must target women, both due to their ownership of MSME and their difficulties to obtain credit.

Tourism can also contribute to the modernization of the agriculture sector, lengthening of value chains and improvement of living and working conditions of local populations. Tourism tends to have long-lasting effects on local diets as new products and visitors' expectations modify the availability of products (OECD, 2018). Moreover, health and superfood trends pressure agriculture systems to satisfy a global demand uninterested in seasonality. Some possible actions include: (re)value local diets and products; seek convergence between agricultural cycles and gastronomic offer; promote agritourism; identify niches for gastronomic tourism; improve quality and availability of local products by strengthening MSMEs; and transfer tourism expectation knowledge to food producers.

## **E. Regional cooperation**

Governments in the region should collaborate more to keep cross-border transport networks open as much as possible, paying special attention to transport operators (cruise, airlines and logistics operators) for facilitating their transit and interchange of crews. Moreover, they should refrain from restraining traffic in transit, except for those measures safeguarding public health. For this purpose, digital solutions need to be promoted that limit physical contact at borders and protect the health of workers. Regional bubbles would also boost intra-regional tourism and promote trust between visitors and destinations such as those established in the Caribbean that could be replicated in other subregions.

Some initiatives have been taken in subregions, mainly in the Caribbean Community (CARICOM), to foster cooperation and coordination to confront the pandemic and its economic outfall. Early May, a public-private (including airlines, cruise operators, hoteliers and labor unions) sub-committee was created to define protocols to ensure safety for workers and visitors upon re-opening of tourism (CARICOM Today, 2020a). Another proposal is the issuance of Certificates of Operation for tourism businesses that comply with these protocols (CARICOM Today, 2020b). Another initiative is the establishment of the COVID-19 Caribbean Tourism Task Force, comprising the Caribbean Public Health Agency (CARPHA), Caribbean Hotel and Travel Association (CHTA), Caribbean Tourism Organization (CTO) and the Global Tourism Resilience and Crisis Management Centre (GTRCMC). This task force will coordinate the tourism industry's readiness and response efforts with the dissemination of support tools, training, and sharing of best practices (CHTA, 2020c).

Similarly, the Organization of Eastern Caribbean States (OECS) has formed a Tourism Task Force with ministries of tourism, tourism and hotel associations and (CARPHA). This task force aims to develop and implement health and safety protocols directed at specific activities such as airports, group transportation, accommodation, tours and attractions (OECS, 2020). Other subregional cooperation mechanisms to confront the pandemic should also be strengthened, such as the Central American Tourism Integration Secretariat (SITCA).

The following actions could be coordinated at the (sub)regional level<sup>11</sup>:

- Create multi-country and multi-stakeholder (related to tourism and regional and international public health organizations such as PAHO and CARPHA) crisis coordination teams to increase information exchange on travel related health and other measures to limit the spread of the virus. These mechanisms should include a gender perspective and rights-based approach in order to consider the different impacts faced by female workers and female employers and other specific groups, such as older workers and those with disabilities and design measures to meet their needs. These teams could provide timely and reliable information for inbound and outbound travelers and tourism operators throughout the region;
- Develop joint guidelines and protocols to restore travel and tourism, including measures as social distancing and hygiene restrictions, rules within airports and on-board aircraft, as well as ports, —covering such aspects as disinfection— and the wearing of protective equipment. International tourism organizations, such as UNWTO and WTTC, are guiding these efforts.
- Enhance bilateral or subregional agreements to accept travelers from certain countries, such as the regional bubbles in the Caribbean and others being discussed in the European Union (The European Sting, 2020) as well as between Australian and New Zealand to encourage tourism between these countries and with other virus-free Pacific countries (Caribbean News Global, 2020a).
- Promote cooperation among national tourism organizations and relevant stakeholders in health, transport and immigration, with the aim to better coordinate measures to mitigate the impact of COVID-19. Moreover, these actors could share initiatives regarding the digitalization of information, collect sex disaggregated data on people with the disease of COVID-19, and create regional platforms and information systems while enforcing data protection and privacy;
- Foster the exchange of good practices among countries in the region on the responses to the crisis, including connectivity, coordination, national relief efforts and measures to support the tourism sector, as well as highlight the positive contribution and efforts made by the private sector in this area to respond to the crisis;
- Coordinate policies and measures to increase confidence among domestic and international travelers to the region, including the development of clear standards and guidelines for a safer and healthier work environment to protect workers, including female workers, in tourism related industries, destinations and establishments;

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<sup>11</sup> These recommendations are inspired in part by ASEAN (2020).

- Create and implement a post COVID-19 Crisis Recovery Plan safeguarding public health and social wellbeing. This plan could include the following actions: enhance national and regional tourism capabilities, engaging with industry stakeholders to increase business and consumer confidence, exploring creative and innovative solutions to stimulate the tourism sector by using digital technologies, coordinating marketing efforts and joint tourism promotion programmes. These should be aimed at promoting subregions as a single tourism destination;
- Assess the social, economic and environmental impacts of cruise ship tourism, including a gender perspective, and define regional standards moving forward to avoid a race to the bottom.
- Strengthen regional integration and cooperation among governments, subregional, regional and international organizations and industry stakeholders to improve the resilience of tourism, as well as promote sustainable and inclusive tourism in the aftermath of this crisis.



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