

Costa Rica

Tourism in the economy

Tourism in Costa Rica has been growing firmly since 2009. In 2014 the country received 2.5 million international tourists, an increase of 4.1% over 2013 and more than 31.4% compared with 2009.

On average, 70% of the tourists arrive to Costa Rica by air. In 2014, 68% were from the United States and Canada, 17% from Europe, and 11% from Mexico and South America.

Domestic tourism is also important for Costa Rica; around 574 000 families travelled within Costa Rica in 2014.

In 2014, international visitors spent USD 2.9 billion on travel and tourism, accounting for about 23% of exports. Tourism directly accounted for 5.3% of GDP. The sector is responsible for around 150 000 direct jobs (almost 7% of total employment), rising to 450 000 if indirect jobs are also included.

Tourism governance and funding

The Costa Rican Tourism Board (*Instituto Costarricense de Turismo – ICT*) is responsible for tourism policy in Costa Rica. The institution, created 60 years ago, is headed by a Board of Directors, which is appointed by the Governing Council. The Directors are representatives of the private sector and serve a six-year term. The Minister of Tourism is the president of the Board.

ICT's main objective is to promote Costa Rica as a tourism destination, and support an appropriate and effective tourism development, with the purpose of improving quality of life for Costa Ricans by maintaining a balance between economic and social impacts, environmental protection, culture and facilities.

The ICT has eight regional offices in the main destinations, through which it maintains a relationship with regional and local chambers and individual businesses. The regional offices also provide a link with other government offices and municipalities.

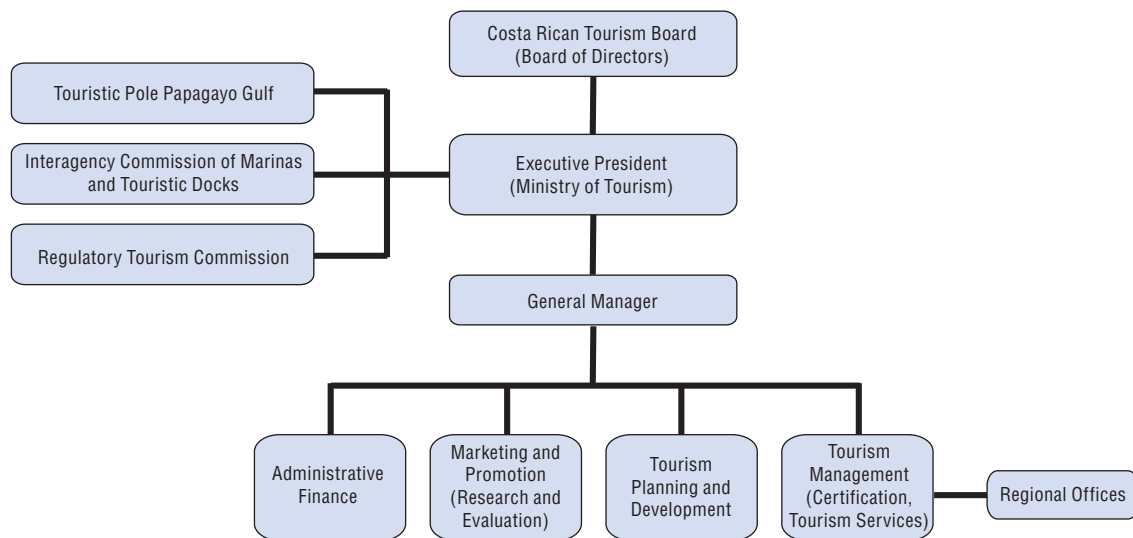
The ICT's budget for 2015 was approximately USD 55 million. Its funding is primarily sourced from charges on air flights and is independent of the national budget.

Tourism policies and programmes

Tourism policy in Costa Rica is based on the following broad principles that underlie the actions of the Costa Rica Tourism Board:

- Sustainability will be the fundamental basis for tourism activity and the national tourism product,

Costa Rica: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2016.

- Tourism shall generate economic benefits, protect the environment, support cultural values and avoid any form of social degradation,
- Tourism development shall foster the well-being of Costa Rican families and improve products in different areas,
- Any incentives given to tourism development must require compliance with ethical, quality and sustainability standards,
- National or foreign tourism investment must also show a commitment to local development,
- Small- and medium-sized companies of high quality will be supported as a strategy for engaging communities,
- International and national promotion will be well planned and relate to the country's overall tourism goals,
- Tourism development will be guided by plans, with objectives, programmes, control measures and actions which are followed up.

Key policy challenges for tourism in Costa Rica include ensuring that tourism remains a principal economic driver and provider of employment, balancing the relationship between quality and price, and continuing to improve the sustainability model.

Costa Rica also needs to increase its tourism competitiveness, focusing on the following areas of improvement: regulations, safety, environment, health, transportation, information technology, price, infrastructure, human resources, cultural resources, affinity for tourism and prioritisation of the sector.

Other challenges identified include the need to strengthen knowledge and data on the tourism sector and its performance and to develop advisory and training programmes. There is also an opportunity to pursue the development of tourism in coastal areas, but this needs to be based on approved plans and programmes to control environmental impacts and meet the needs of local populations.

In order to meet these challenges and opportunities, Costa Rica is updating its National Plan for Sustainable Tourism for the period 2017-21, and is working on an institutional plan for the ICT covering 2016-21, and reviewing its Marketing Plan 2017-21, based on the diversification of markets. All these plans are validated with tourism chambers and private sector associations.

An important part of the strategy to diversify the tourism offer, reduce seasonality and strengthen economic linkages is to promote the Meetings, Incentives, Conferences and Exhibitions (MICE) market and products. This includes the promotion of events, congresses and conventions in various areas by government, non-governmental and corporate bodies. A specific initiative is the development of the first Conference and Convention Centre, with construction due to start in 2016.

Costa Rica has had a comprehensive technical and political agenda to develop air access since 2008, through its airline attraction programme. The programme involves regular meetings with airlines that currently operate in Costa Rica and those in which the country has a future interest. This has helped to develop mutual understanding and work towards short, medium and long-term goals.

Costa Rica's tourism development model is based on the principles of sustainability. This is highly significant in terms of the country's product, market and general tourism principles. A key component of the model is a provision of standards and certification, which is currently being revised.

Sustainability standards and compliance in Costa Rica

The Government of Costa Rica implemented in the touristic industry the Certification for Sustainable Tourism (CST) since 1995. This requires a balanced interaction between the use of natural and cultural resources and improvement of quality of life for local communities and economic success of the industry, which also contributes to national development. The CST scheme encourages adherence to sustainability principles in the development and operation of tourism enterprises, with the active participation of communities and providing a new source of competitiveness in the business sector. CST certification is voluntary and by 2014 had been granted to around 330 companies. This certification is now being reviewed and CST 2.0 is being developed. The new scheme will expedite the process of evaluating companies while maintaining its rigour. The standard will be widely adapted to a full range of tourism activities. It will also assess compliance with performance indicators rather than just the presence of certain activities.

Another standard and certification that is also being further developed in Costa Rica is the Blue Flag Programme for beaches. This joint initiative involves institutions from the tourism, health, water, environment and education sectors. Coastal communities play a key part in actions to ensure that beaches and maritime environment achieve the required standards.

Statistical profile

Table 1. Costa Rica: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	2 495	2 528	2 542	2 641	2 760
Overnight visitors (tourists)	2 100	2 192	2 343	2 428	2 527
Same-day visitors (excursionists)	395	336	199	213	233
Top markets					
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Nights in all types of accommodation	22 258 e	24 113 e	27 181 e	28 164 e	31 333 e
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	662	717	773	790	798
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Slovak Republic	..	..	..	..	..
Croatia	..	..	..	..	..
Austria	..	..	..	..	..
Italy	..	..	..	..	..
Greece	..	..	..	..	..
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	2 179	2 375	2 557	2 907	2 953
International travel receipts	1 999	2 152	2 313	2 665	2 864
International passenger transport receipts	180	223	244	243	89
Outbound tourism					
Total international expenditure	533	522	567	560	586
International travel expenditure	424	405	429	440	461
International passenger transport expenditure	109	117	138	121	125

.. Not available; e Estimated value

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933320798>


Table 2. **Costa Rica: Enterprises and employment in tourism**

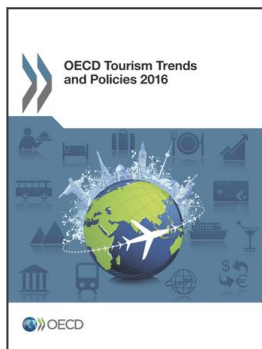
	Number of establishments	Number of persons employed				
	2014	2010	2011	2012	2013	2014
Total	..	..	120 084	130 438	150 552	147 925
Tourism industries	3 312	..	94 754	106 747	124 794	121 528
Accommodation services for visitors	..	..	..	..	..	..
Hotels and similar establishments	2 549	..	66 580	79 774	89 339	87 420
Food and beverage serving industry	334	..	..	..	..	..
Passenger transport	..	..	14 291	11 492	10 499	12 141
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	..	..	..	..	..	..
Water passenger transport	22	..	..	..	..	..
Passenger transport supporting services	20	..	..	..	..	..
Transport equipment rental	38	..	..	..	..	..
Travel agencies and other reservation services industry	322	..	..	..	..	..
Cultural industry	..	..	13 883	15 481	24 956	21 967
Sports and recreation industry	27	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries
Other industries	25 330	23 691	25 758	26 397

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320800>



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