

# Costa Rica

## Tourism in the economy and outlook for recovery

Tourism is an important sector for the Costa Rican economy and directly accounted for 4.8% of total GDP in 2019, according to the Tourism Satellite Account. In 2021, tourism employed 150 483 people, an increase compared to 2020, but still 20 387 people below 2019 levels. Tourism enterprises in the hospitality sector remained stable at 3 700 enterprises in 2020 due to ongoing support through the pandemic, and increased by an additional 4% in 2021.

International tourism receipts declined 66.6% to USD 1.5 billion in 2020. This was driven by a 67.8% decline in international tourists to 1.0 million in 2020. International tourist arrivals in Costa Rica recovered to 1.3 million in 2021 but remained 57.1% below pre-pandemic levels.

The United States remained the largest market in 2021 with 868 986 arrivals, followed by Europe with 229 813 arrivals, coming mainly from Germany, Spain, France and Switzerland. Costa Rica expects international visitors to return to pre-pandemic levels by 2024.

## Tourism governance and funding

The Minister of Tourism chairs the Tourism Sector, which is made up of the Costa Rican Tourism Institute (ICT), Ministry of Culture and Youth, Ministry of Public Security, Government and Police and the Costa Rican Institute of Pacific Ports.

The Costa Rican Tourism Institute is an autonomous state institution whose main purpose is to increase tourism in Costa Rica, promote spending and a pleasant stay by international visitors, promote the construction and maintenance of tourist accommodation and attractions, brand and promote the country overseas, and attract national and foreign investments through the Investment Attraction Unit. As a public institution, the ICT is responsible for the formulation of public policy, as well as the design and execution of technical and legal instruments to carry out these policies. The ICT is also in charge of drawing up and managing the National Tourism Plan.

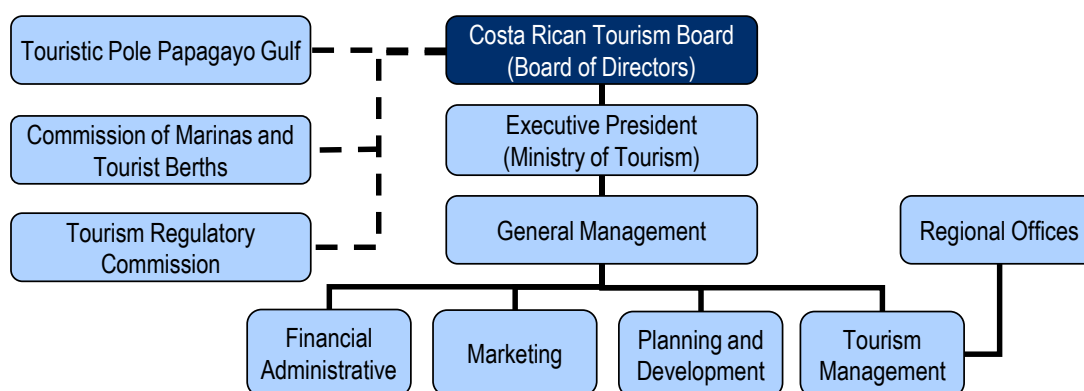
The Regional Tourism Offices collaborate with the tourism sector by processing the country's quality programmes, such as the Tourism Declaration and the Certificate for Sustainable Tourism, tourist transportation certificates and tourist guide credentials, and the Safe Travels seal developed in response to COVID-19. In addition, they collaborate in the promotion of their regions in the development of international press tours.

The Costa Rican Tourism Institute leads the country's tourism sector with collaboration from a number of bodies, such as the Ministries of Foreign Relations, Economy and Trade, Transport, Environment and Energy, Health, and Foreign Trade. In particular, there is a strategic alliance between the Costa Rican Tourism Institute and the Costa Rican Investment Promotion Agency through a co-operation agreement for the promotion and attraction of foreign investment projects for tourism infrastructure.

The Costa Rican Tourism Institute is financed mainly by revenue from entry and departure taxes and non-tax revenues from rents and leases. In 2021, 84.4% of the ICT budget came from tax revenues, and 2.6% came from non-tax revenues. The remaining 13% came from a CRC 3 billion transfer from the central government. Prior to the COVID-19 pandemic, the income received was CRC 32.9 billion, representing a 37% year-on-year increase between 2015 and 2019 associated with an increase in international arrivals and the departure of nationals.

In 2022, the ICT's budget was CRC 16.7 billion, mostly funded through taxes (99.5%), with the remainder funded through non-tax revenues. Revenues are recovering, and projections expect a return to 2019 levels by the end of 2023.

### Costa Rica: Organisational chart of tourism bodies



Source: OECD, adapted from the Costa Rican Tourism Board, 2022.

### Tourism policies and programmes

The National Tourism Plan 2022-27 is being updated to include new strategic proposals for the next five years, with a special focus on five strategic axes:

- Promoting the efficient use of the tourist space and maintaining natural sites. This involves the responsibility for acquiring land and managing construction.
- Developing and diversifying the tourism product, including for digital nomads.
- Differentiating Costa Rica's positioning, focusing on high-quality products, experience, and well-being.
- Generating productive value chains across different subsectors.
- Enhancing the tourist experience with a commitment to health and safety.

Each of these axes contains grouped objectives, goals and specific actions to develop. Tourism is also included in the sectoral strategic proposal of the National Development Plan 2018-21.

In 2021, Costa Rica launched the Tourism Local Development Engine (Tu-MoDeLo) initiative aimed at improving the livelihoods of agricultural communities through the identification of market opportunities in the tourism sector for sustainable agriculture value chains adapted to climate change. Costa Rica's sustainability values are based on a commitment to the principles of decarbonisation and respect for the environment. Costa Rica prioritises the reuse of materials, use of sustainable elements, energy savings, and hiring local personnel to achieve its sustainability principles. Other values include culture, sustainable gastronomy and the application of health protocols against COVID-19. Costa Rica's focus is promoting the

country as a year-round destination, with multiple outdoor activities that can be visited safely and sustainably.

Since the beginning of the pandemic, Costa Rica has worked on the reactivation of tourism, including the development of 17 health protocols for each tourism sub-sector against COVID-19, in conjunction with the private sector.

Following the recovery from the pandemic, a key target sector for Costa Rica is longer-term visitors who will make more local purchases and redistribute money along the tourism value chain, including a focus on digital nomads. Additionally, Costa Rica is now positioning itself as a filming destination in recognition of the growing television on-demand industry. Costa Rica is pursuing new airline routes and frequencies to align with these objectives.

### Certificate of Tourism Sustainability 2.0 in Costa Rica

The Costa Rican Tourism Institute launched the original Certification for Sustainable Tourism in 1997. This programme awards companies that follow sustainable practices. In 2018, Costa Rica restructured and updated the programme to adapt to new international standards, including the Sustainable Development Goals and the criteria of the Global Sustainable Tourism Council. The updated tool also adapts to the size of different companies and eliminates the need for face-to-face evaluation in some cases.

The objectives of Certificate for Sustainable Tourism 2.0 are:

- Differentiate Costa Rica as a sustainable tourist destination.
- Provide reliable information to tourists on certified companies and organisations.
- Use sustainability as a competitive element within the tourism sector.
- Incorporate technological advances to remain innovative and updated.
- Strengthen the social, cultural, environmental and economic development of tourist destinations.

As of 2022, more than 400 tourism companies are CST-certified, including hotels, restaurants, travel agencies and tourism attractions.


## Statistical Profile

## Costa Rica: Domestic, inbound and outbound tourism

|  | 2017     | 2018     | 2019     | 2020     | 2021     |
|--|----------|----------|----------|----------|----------|
| <b>TOURISM FLOWS, THOUSAND</b>                       |          |          |          |          |          |
| <b>Domestic tourism</b>                              |          |          |          |          |          |
| Total domestic trips                                 | ..       | ..       | ..       | ..       | ..       |
| Overnight visitors (tourists)                        | ..       | ..       | ..       | ..       | ..       |
| Same-day visitors (excursionists)                    | ..       | ..       | ..       | ..       | ..       |
| Nights in all types of accommodation                 | ..       | ..       | ..       | ..       | ..       |
| Hotels and similar establishments                    | ..       | ..       | ..       | ..       | ..       |
| Other collective establishments                      | ..       | ..       | ..       | ..       | ..       |
| Private accommodation                                | ..       | ..       | ..       | ..       | ..       |
| <b>Inbound tourism</b>                               |          |          |          |          |          |
| Total international arrivals                         | 3 230    | 3 313    | 3 378    | 1 147    | 1 376    |
| Overnight visitors (tourists)                        | 2 960    | 3 017    | 3 139    | 1 012    | 1 347    |
| Same-day visitors (excursionists)                    | 271      | 296      | 239      | 135      | 29       |
| Top markets  |          |          |          |          |          |
| United States  | 1 199    | 1 265    | 1 335    | 435      | 869      |
| Europe   | 462      | 480      | 501      | 170      | 230      |
| Central America                                      | 735      | 691      | 699      | 202      | 78       |
| South America  | 181      | 190      | 196      | 50       | 60       |
| Canada   | 202      | 217      | 235      | 116      | 53       |
| Nights in all types of accommodation                 | 35 222 e | 35 295 e | 39 552 e | 13 054 e | 18 320 e |
| Hotels and similar establishments                    | ..       | ..       | ..       | ..       | ..       |
| Other collective establishments                      | ..       | ..       | ..       | ..       | ..       |
| Private accommodation                                | ..       | ..       | ..       | ..       | ..       |
| <b>Outbound tourism</b>                              |          |          |          |          |          |
| Total international departures                       | ..       | ..       | ..       | ..       | ..       |
| Overnight visitors (tourists)                        | 1 150    | 1 079    | 1 153    | 324      | 588      |
| Same-day visitors (excursionists)                    | ..       | ..       | ..       | ..       | ..       |
| Top destinations                                     |          |          |          |          |          |
| North America  | 371      | 376      | 418      | 131      | 333      |
| United States  | 254      | 251      | 280      | 94       | 245      |
| Central America                                      | 588      | 583      | 604      | 167      | 222      |
| Panama   | 241      | 301      | 310      | 89       | 128      |
| Nicaragua  | 220      | 141      | 151      | 47       | 44       |
| <b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b> |          |          |          |          |          |
| <b>Inbound tourism</b>                               |          |          |          |          |          |
| Total international receipts                         | 3 758    | 4 072    | 4 340    | 1 450    | ..       |
| International travel receipts                        | 3 656    | 3 769    | 3 989    | 1 328    | ..       |
| International passenger transport receipts           | 102      | 304      | 351      | 122      | ..       |
| <b>Outbound tourism</b>                              |          |          |          |          |          |
| Total international expenditure                      | 1 322    | 1 198    | 1 451    | 678      | ..       |
| International travel expenditure                     | 1 044    | 838      | 1 036    | 243      | ..       |
| International passenger transport expenditure        | 278      | 360      | 415      | 434      | ..       |

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/3ztvrm>

## Costa Rica: Enterprises and employment in tourism

|   | Number of establishments | Number of persons employed |                |                |                |                |
|---|--------------------------|----------------------------|----------------|----------------|----------------|----------------|
|   | 2021                     | 2017                       | 2018           | 2019           | 2020           | 2021           |
| <b>Total</b>  | ..                       | ..                         | ..             | ..             | ..             | ..             |
| <b>Tourism industries</b>                                     | <b>5 004</b>             | <b>155 296</b>             | <b>160 976</b> | <b>170 870</b> | <b>127 570</b> | <b>150 483</b> |
| Accommodation services for visitors                           | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Hotels and similar establishments                             | 3 765 e                  | 28 677                     | 27 622         | 31 743         | 17 938         | 24 293         |
| Food and beverage serving industry                            | 421                      | 98 844                     | 99 402         | 103 099        | 89 448         | 100 963        |
| Passenger transport   | ..                       | 4 074                      | 8 353          | 6 993          | 2 744          | 6 131          |
| Air passenger transport                                       | 17                       | ..                         | ..             | ..             | ..             | ..             |
| Railways passenger transport                                  | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Road passenger transport                                      | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Water passenger transport                                     | 31                       | ..                         | ..             | ..             | ..             | ..             |
| Passenger transport supporting services                       | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Transport equipment rental                                    | 55                       | 3 835                      | 6 585          | 6 843          | 7 052          | 5 070          |
| Travel agencies and other reservation services industry       | 527                      | 5 852                      | 6 178          | 5 025          | 3 014          | 2 295          |
| Cultural industry   | ..                       | 7 823                      | 5 777          | 8 122          | 3 746          | 6 685          |
| Sports and recreation industry                                | 125                      | 6 191                      | 7 059          | 9 045          | 3 628          | 5 046          |
| Retail trade of country-specific tourism characteristic goods | ..                       | ..                         | ..             | ..             | ..             | ..             |
| Other country-specific tourism industries                     | 63                       | ..                         | ..             | ..             | ..             | ..             |
| <b>Other industries</b>                                       | ..                       | ..                         | ..             | ..             | ..             | ..             |

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/r9jyl3>



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