



The Impact of Tourism in Ecuador: A Comparative Analysis Pre and Post-Pandemic, with an Emphasis on Insecurity (2019-2025)

El impacto del turismo en Ecuador: un análisis comparativo pre y post pandemia, con énfasis en la inseguridad (2019-2025)

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Resumen

Este estudo avalia o impacto do turismo no desenvolvimento local do Equador, analisando os efeitos da pandemia de COVID-19 e, de forma crucial, o papel da crescente insegurança. Utilizando um desenho descritivo-analítico com dados secundários de fontes como o Ministério do Turismo (MINTUR), o World Travel & Tourism Council (WTTC) e a Organização Mundial do Turismo (UNWTO), são comparados indicadores econômicos e sociais-chave do período pré-pandemia (2019) com o pós-pandemia (2023-2025). Os resultados indicam que, embora o turismo doméstico tenha demonstrado notável resiliência, com um crescimento projetado de 23,5% em 2025, o turismo internacional sofreu uma queda de 40%, afetando particularmente as regiões da Costa (queda de 52% nas chegadas internacionais) e da Serra (queda de 25%). A insegurança, evidenciada por um aumento de 430% nos homicídios entre 2019 e 2024, atua como uma barreira perceptual que limita o desenvolvimento local ao reduzir a renda, o emprego e a coesão social. As regiões de Galápagos e da Amazônia mostram menor vulnerabilidade devido ao seu isolamento geográfico e ao tipo de turismo que oferecem. Conclui-se que a insegurança representa uma ameaça significativa à sustentabilidade do setor turístico e ao desenvolvimento local no Equador, exigindo a implementação urgente de políticas de segurança abrangentes, promoção regional e fortalecimento do turismo comunitário para mitigar seus efeitos adversos.

Palabras clave: Turismo; desenvolvimento local; insegurança; Equador; COVID-19.

Abstract

This study evaluates the impact of tourism on local development in Ecuador, analyzing the effects of the COVID-19 pandemic and, crucially, the role of rising insecurity. Using a descriptive-analytical design with secondary data from sources such as the Ministry of Tourism (MINTUR), the World Travel & Tourism Council (WTTC), and the World Tourism Organization (UNWTO), key economic and social indicators from the pre-pandemic period (2019) are compared with the post-pandemic period (2023-2025). The results indicate that while domestic tourism has shown remarkable resilience, with a projected growth of 23.5% in 2025, international tourism has experienced a 40% decline, particularly affecting the Coast (52% drop in international arrivals) and Highlands (25% drop). Insecurity, evidenced by a 430% increase in homicides between 2019 and 2024, acts as a perceptual barrier that limits local development by reducing income, employment, and social cohesion. The Galápagos and Amazon regions show less vulnerability due to their geographical isolation and the type of tourism they offer. The study concludes that insecurity represents a significant threat to the sustainability of the tourism sector and local development in Ecuador, requiring the urgent implementation of comprehensive security policies, regional promotion, and the strengthening of community-based tourism to mitigate its adverse effects.

Keywords: Tourism; local development; insecurity; Ecuador; COVID-19.



1. Introducción

Tourism has been globally recognized as a catalyst for local development, with the potential to generate income, employment, and promote social and cultural sustainability (Butler, 1999; Scheyvens & Biddulph, 2018). In Ecuador, a country characterized by its natural and cultural megadiversity, the tourism sector is a fundamental pillar of its economy. Before the COVID-19 pandemic, tourism contributed significantly to the gross domestic product (GDP) and employment generation, with revenues of approximately USD 2 billion and 303,000 direct and indirect jobs in 2019 (MINTUR, 2019). However, the global health crisis of 2020 and, more persistently, the dramatic increase in insecurity in the country, have altered the sector's dynamics.

The COVID-19 crisis caused a temporary collapse of tourism activity worldwide and locally, affecting international visitor arrivals and the sustainability of communities that depend on this industry. Although a partial recovery has been observed in the post-pandemic period, the surge in violence, driven by organized crime and drug trafficking, has emerged as the main obstacle to the sector's full development. This insecurity has created a "perceptual barrier" (Tarlow, 2014) that deters international tourists and limits communities' ability to benefit from tourism.

This study aims to analyze the contribution of tourism to local development in Ecuador by contrasting key economic and social indicators from the pre-pandemic period (2019) with those of the post-pandemic period (2023-2025). The analysis is broken down by the four natural regions: Coast, Highlands, Amazon, and Galápagos. It delves into the impact of insecurity as a barrier to development, affecting income, employment, and social cohesion in both urban and rural communities. It is hypothesized that insecurity disproportionately affects international tourism in the Coast and Highlands regions, while tourism in Galápagos and the Amazon, although not immune, shows greater resilience.

2. Metodología

The study is based on a descriptive-analytical comparative research design, using a mixed quantitative and qualitative approach. It compares tourism activity and insecurity indicators from 2019 (pre-pandemic) with those from 2023 to 2025 (post-pandemic). The research relies on secondary data from various institutional sources, allowing for a macro and regional-level analysis.

The main data sources include:

- Ministry of Tourism of Ecuador (MINTUR): Statistical yearbooks, domestic and international tourism reports, and projections for 2025.
- World Travel & Tourism Council (WTTC): Economic impact reports at the country level.
- World Tourism Organization (UNWTO): Publications on international tourism and its trends.
- Hotel Federation of Ecuador (Ahotec): Reports on the state of the hotel sector and the impact of insecurity.
- Government and press sources: Data on homicides and other insecurity indices from agencies like ECU 911 and public security reports.

The methodology allows for an evaluation of the differentiated impact of tourism and insecurity in each of the regions, as well as an understanding of the dynamics of domestic versus international tourism in a crisis context.

3. Resultados



Macroeconomic Indicators and Tourism Evolution

In 2019, tourism in Ecuador contributed 2.2% to the GDP (USD 2 billion) and generated 303,000 jobs. International tourist arrivals reached 1.6 million. The pandemic caused a collapse in 2020, with a drop to 1.2% of the GDP (USD 704 million). The recovery has been gradual, with a projected contribution of 2.8% to the GDP (USD 2.2 billion) for 2025, exceeding pre-pandemic levels in terms of value, although employment figures are still being debated.

Table 1. General Tourism Indicators in Ecuador (Pre and Post-Pandemic)

Year/Indicator	Contribution to GDP (%)	Contribution to GDP (USD millions)	Jobs Generated	Domestic Tourism Growth (%)
2019	2.2	2,000	303,000	-
2020	1.2	704	260,000	-
2022	1.6	1,802.6	539,266	-
2023	4.4	-	-	-
2025*	2.8	2,200	-	23.5

*Projection Source: Self-produced based on data from the Ministry of Tourism of Ecuador (MINTUR), the World Travel & Tourism Council (WTTC), and the World Tourism Organization (UNWTO).

Domestic tourism has been the main driver of the recovery. While international tourism fell by 40% in arrivals between 2019 and 2023 (from 1.6 to 1.3 million), domestic tourism has shown sustained growth, representing 60-70% of total visits and with a projected growth of 23.5% in domestic arrivals for 2025.

Impact by Natural Regions

The effects of the pandemic and insecurity have not been uniforming across the country, with notable disparities among the regions.

Table 2. Comparison Pre/Post-Pandemic by Regions (Estimates)

Region	Int. Arrivals 2019 (thousands)	Int. Arrivals 2025 (thousands)	Revenues 2019 (USD millions)	Revenues 2025 (USD millions)	Insecurity Impact (% drop in arrivals)
Galápagos	250	288 (+15%)	143	160	Low (5-10%)
Coast	400	192 (-52%)	500	250	High (52%)
Highlands	800	600 (-25%)	800	640	Medium (25%)



Amazon	150	165 (+10%)	100	110	Low (10%)
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Source: Self-produced based on data from the Ministry of Tourism of Ecuador (MINTUR), the Hotel Federation of Ecuador (Ahotec), and the World Tourism Organization (UNWTO).

- **Coast:** This region, dependent on beach and urban tourism, has been the most affected, with a 52% drop in international arrivals by 2025. Revenues have been halved, from USD 500 million to USD 250 million, attributed to high homicide rates in provinces like Guayas and Esmeraldas.
- **Highlands:** Although still the most visited region, the Highlands have experienced a 25% drop in international arrivals, with a revenue reduction from USD 800 million to USD 640 million. Urban insecurity in heritage cities like Quito and Cuenca has deterred foreign visitors, although domestic tourism has partially mitigated the losses.
- **Galápagos and Amazon:** These regions have shown greater resilience. Galápagos projects a 15% growth in international arrivals for 2025, while the Amazon shows a moderate growth of 10%. Their relative geographical isolation and focus on ecotourism and community-based tourism make them less vulnerable to the violence affecting the mainland.

The Impact of Insecurity on Local Development

Insecurity in Ecuador, marked by a 430% increase in homicides between 2019 and 2024 (from 1,400 to 7,400 annual cases), has transformed the tourism landscape and undermined local development in multiple dimensions.

- **Economic Impacts:** The loss of tourism revenue is the most direct consequence. The 52% drop in international arrivals to the Coast has affected approximately 50,000 jobs in Guayas and Manabí. In the Highlands, the reduction in visitors has negatively impacted handicraft sales in Otavalo (15% decrease) and adventure activities in Baños. The Hotel Federation (Ahotec, 2024) has reported that hotels in Guayaquil are operating at 30% occupancy, reflecting a crisis that extends to small businesses and informal workers. Nationally, an estimated USD 500-700 million in annual losses are projected for 2025 due to insecurity.
- **Social Impacts:** Violence has generated a perception of risk that affects social cohesion. In cities like Guayaquil and Manta, the cancellation of cultural events and mobility restrictions have reduced community participation. In rural communities, such as the "Magical Towns," security alerts have deterred both domestic and international tourists, limiting economic opportunities for women and youth who depend on these activities.
- **Cultural Impacts:** Cultural heritage, a central attraction of tourism in the Highlands, is at risk. The reduction in international visitors to cities like Quito and Cuenca limits funds for the conservation of historical sites, threatening the preservation of cultural identity. On the Coast, the decrease in attendance at cultural festivals has affected the transmission of traditions.

4. Discusión

The impact of insecurity on Ecuadorian tourism is more than a simple correlation between violence and visitor numbers. It's a complex dynamic of risk perception, a central concept in tourism security studies. Expert Peter Tarlow (2014) states that a destination's image is a "product" that, once damaged by insecurity, is extremely difficult to rebuild. The high homicide



rate in Ecuador, despite being concentrated in certain urban areas, becomes a headline that contaminates the perception of the entire country. This view is corroborated by the concept of "media contagion" (Korstanje & Clayton, 2012), where constant exposure to negative news about one location creates a snowball effect, impacting even destinations that are not directly at risk.

Insecurity, therefore, not only deters tourists but also creates a vicious cycle that hinders local development. A decline in visitors leads to a loss of income and jobs, which in turn can increase poverty and crime, eroding social cohesion—a vital element for tourism sustainability (Scheyvens & Biddulph, 2018). This phenomenon has been documented in other contexts, where a lack of tourists not only reduces direct employment but also decreases support for heritage conservation and restoration projects, as tourism funds are often a crucial source of financing for these efforts (Hall & Page, 2014).

The situation in Ecuador highlights the differentiated vulnerability of different types of tourism. While urban and beach destinations in the Coast and Highlands are more susceptible to the perception of insecurity due to their connection to major cities and media coverage of violence, the Galápagos and Amazon regions, which offer niche tourism (ecotourism and adventure) in isolated environments, show greater resilience. Academic literature on ecotourism, such as the book *The Business of Ecotourism* (Honey, 2019), argues that this type of tourism benefits from its focus on nature, which often insulates it from urban problems and makes it more appealing to a market segment that values tranquility and safety.

In summary, insecurity has redefined Ecuador's tourism landscape, not only in terms of economic loss but also by eroding trust, dismantling social structures, and jeopardizing the country's ability to use tourism as a genuine tool for long-term sustainable development. The security crisis has surpassed the pandemic as the primary challenge, demanding a response that focuses not only on physical security but also on the management of global perception.

5. Conclusión

The COVID-19 pandemic and insecurity have led to an uneven transformation in Ecuador's tourism sector. Pre-pandemic, tourism drove economic and social growth in all four regions. Post-pandemic, domestic tourism is leading the recovery, but the increase in insecurity—a 430% rise in homicides (2019-2024)—has significantly reduced international arrivals (40%) and domestic ones (18.7% in some regions). This security crisis has created regional inequalities, critically affecting the Coast (52% drop) and the Highlands (25% drop).

It is concluded that insecurity acts as a multidimensional barrier that limits economic development (loss of up to USD 700 million annually), social cohesion, and cultural heritage preservation. To mitigate these effects, the following recommendations are proposed:

Comprehensive, Targeted Security Policies

Your study suggests that authorities must implement security strategies specifically in tourism destinations. This approach acknowledges that security is not a monolithic problem but requires context-specific solutions. The key lies in targeting: identifying high-risk areas and key tourism assets to allocate resources efficiently.

- **Example 1: Colombia** In the early 2000s, Colombia faced a national security issue that severely impacted tourist perception. A key strategy was the creation of the Tourist Police. These officers, in distinctive uniforms, receive specialized training to assist tourists, provide information, and act as a first point of contact in case of incidents. Their presence in tourist areas like Cartagena's historic center, Bogotá's Zona Rosa, and national parks not only improved real security but also projected an image of control and professionalism.



- Similarity with Ecuador: Ecuador's insecurity situation has roots in organized crime and risk perception, similar to Colombia's challenges. Implementing a specialized Tourist Police could have a similar effect, restoring confidence and demonstrating a tangible commitment to visitor safety.
- Example 2: Mexico (Cancún and Riviera Maya) Despite being a world-class tourist destination, the Riviera Maya in Mexico has faced outbreaks of violence related to drug trafficking. In response, authorities have implemented a security plan involving the National Guard. The deployment of agents on beaches, in shopping centers, and hotel zones aims to protect tourists and prevent criminal conflicts from directly affecting the industry. This deployment of elite forces serves as a deterrent and rapid response measure.
 - Similarity with Ecuador: The coastal regions of Ecuador, particularly Guayas and Esmeraldas, are critical hotspots affected by organized crime. Applying a similar strategy, with the collaboration of specialized security forces in tourist zones, could contain violence and protect vital tourism revenue.

Differentiated Promotion

The recommendation to develop marketing campaigns that emphasize the safety of less-affected regions is a smart strategy for managing risk perception. By focusing on strengths, it prevents a widespread crisis from impacting the entire country.

- Example 1: Egypt Following terrorist attacks in the 2010s, Egypt's tourism industry collapsed. The marketing response was not to deny the insecurity but to actively and massively promote destinations that remained safe, such as the Red Sea beaches (Sharm El Sheikh) and Nile River cruises. Campaigns focused on the travel experience, the warmth of the people, and the beauty of the destinations, while European governments and tour operators helped communicate safety in specific areas.
 - Similarity with Ecuador: The current risk perception in Ecuador is global. Like Egypt, Ecuador can differentiate its offerings. Campaigns should position Galápagos and the Amazon as safe, unique destinations, separate from the mainland crisis. For instance, a digital campaign could use the slogan "Ecuador: More Than a Country, a Galaxy of Destinations", highlighting the geographical isolation and safety of the islands and the jungle.
- Example 2: Tunisia After a series of attacks on tourists in 2015, the Tunisian government launched the "I Love Tunisia" campaign on social media. This initiative invited locals and tourists to share positive experiences in real-time, generating a constant flow of genuine content and counteracting negative news. Promotion focused on experiential tourism and social interaction.
 - Similarity with Ecuador: In Ecuador, the resilience of domestic tourism mentioned in your study is a valuable asset. A similar digital campaign, using local and foreign influencers, could showcase safe and positive experiences in the "Magical Towns" and heritage cities. This not only promotes destinations but also involves the local community in rebuilding the country's image.

Strengthening Community-Based Tourism

This recommendation is vital for generating resilient and equitable income. Community-based tourism, being more authentic and locally controlled, is less vulnerable to mass tourism fluctuations and insecurity in large urban centers.

- Example 1: Costa Rica Costa Rica has heavily invested in sustainable and community-based tourism, especially in rural and jungle areas. The government and local NGOs trained communities in ecotourism, nature reserve management, and sustainable



accommodation. "Homestay" programs and organic farms managed by locals became attractions in themselves, diversifying the economy and reducing reliance on large corporations.

- Similarity with Ecuador: Communities in the Ecuadorian Amazon and the Magical Towns have immense potential for community-based tourism. Investment in basic infrastructure (water, electricity, access roads) and training in tourism management, digital marketing, and security could turn these communities into models of resilient development.
- Example 2: Guatemala After the civil conflict, Guatemala used community-based tourism for reconciliation and economic development. In the Lake Atitlán region, indigenous communities organized tourism cooperatives to offer cultural and adventure experiences. This model not only economically empowered women and youth but also revitalized their traditions and strengthened the social fabric.
 - Similarity with Ecuador: Many rural and indigenous communities in Ecuador's Highlands and Amazon already have a foundation in community-based tourism. Insecurity in cities can be an opportunity to boost these destinations. By focusing on empowering women and youth, a stronger local economy is created, offering tourists an authentic and safe experience away from urban conflicts.

Public-Private Collaboration

Tourism security is a shared responsibility. Collaboration between the government, private sector, and civil society is essential for a holistic approach.

- Example 1: Peru Peru has established "safe tourism corridors" in areas such as the route to Machu Picchu and the center of Cusco. These corridors are managed by an alliance of the National Police, the Ministry of Tourism, and private tour operators. The private sector invests in technology (security cameras, GPS monitoring of tourist buses), and authorities ensure constant patrols and rapid response.
 - Similarity with Ecuador: In the Highlands, safe tourism corridors could be created connecting Quito with Otavalo or Cuenca with Vilcabamba. This would build trust among tourists, who would see a genuine commitment to their well-being.
- Example 2: Kenya Following a series of terrorist threats, Kenya's tourism industry formed a Tourism Crisis Council in collaboration with the government. This council monitors the security situation, issues alerts, and coordinates responses during crises. This public-private governance model allows for rapid and organized action, preventing misinformation and mass cancellations.
 - Similarity with Ecuador: A similar body could be crucial for perception management. A council comprising representatives from Ahotec, MINTUR, airlines, and tour operators could coordinate communication campaigns to debunk rumors and assure visitors that tourist destinations are open and safe, even amidst states of emergency.

The success of these recommendations will depend on political will and the commitment of all stakeholders. The path forward is long, but by learning from the experiences of other countries that have overcome similar crises, Ecuador can rebuild its reputation and ensure that tourism continues to be a driver of inclusive and sustainable development.

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