



Establishment Survey in the Tourism Sector in El Salvador

Preliminary Results

May 2021



IMPAAQ
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Establishment Survey in the Tourism Sector in El Salvador

Summary Report

El Salvador

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Project

Labor Market Supply and Demand in the Northern Triangle: Leveraging Data to Build and Efficient labor Market

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Recognitions

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Introduction

IMPAQ International (IMPAQ), funded by the US Department of Labor Bureau of International Labor Affairs, is implementing the project *Labor Market Supply and Demand in the Northern Triangle: Leveraging Data to Build an Efficient Labor Market*. The objective of this project is to provide technical assistance to El Salvador, Guatemala, and Honduras (i.e. the Northern Triangle countries) to improve labor market efficiency and performance by assisting all three countries to develop labor market information (LMI) systems that publish reliable, comprehensive, and current LMI in user-friendly formats. It also seeks to create local capacities in the use of LMI. One of the main components of this project is to facilitate the creation of a pilot establishment survey that captures labor demand data in a high-growth economic sector.

In collaboration with *la Cámara Salvadoreña de Turismo* (CASATUR), the IMPAQ team conducted a pilot telephone survey of establishments¹ entitled the Establishment Survey in the Tourism Sector in El Salvador 2020 (*la Encuesta al Sector Turismo de El Salvador (ENSETUR) 2020*).² IMPAQ collected data between August and December 2020 in the tourism sector, specifically from hotels, restaurants, and tour operators.

The study sought to create a snapshot of the tourism sector amid the COVID-19 pandemic, capturing data during quarantine and the initial reopening of the economy. The results section indicates the reference period for the information reported. For more information about the pandemic and quarantine in El Salvador, see Annex A.

What is an Establishment Survey?

An establishment survey collects data to generate and disseminate LMI related to employment characteristics that are in demand in a country's private sector.

The IMPAQ team used standardized methodologies and international best practices to collect information to:

- Characterize the labor demand of the primary positions in the chosen sector (for example, educational training, requirements, and competencies).
- Determine the number of current hires as well as the previous and future demand for jobs in the private sector.
- Identify the current and medium-term training needs of the chosen sector.

Implementation of the Establishment Survey in the Tourism Sector in El Salvador 2020

Geographic Reach

The IMPAQ team implemented the survey in all fourteen departments in El Salvador: Sonsonate, Ahuachapán, Santa Ana, Chalatenango, La Libertad, San Salvador, La Paz, Cuscatlán, Cabañas, San Vicente, Usulután, San Miguel, Morazán and La Unión. Exhibit 1 shows the geographic distribution of the surveyed tourism establishments.

¹ Establishment: a part of a business upon which it depends on administratively that has less decision-making autonomy.

² Due to the protocols to avoid COVID-19 infections, the survey was carried out in two parts, the first by telephone and the second online or by telephone according to the preference of the respondent.

Exhibit 1. Geographic Reach of the Establishment Survey



Coverage by Size

In very small establishments, workers usually carry out a wide variety of tasks that correspond to more than one job position. This makes it difficult to classify them. For this reason, during the data collection and data cleaning process, the IMPAQ team decided to exclude establishments with fewer than two workers.

Unit of Analysis and Key Informants

The unit of analysis is the establishment, compensated employees, and job positions (filled and vacant). In the majority of cases, the informant was the establishment's owner, manager, administrator, or human resources manager.

Design and Sample Selection

In short, the population of interest for the survey were private sector establishments that were operational in 2019 with two or more employees and whose principal or secondary economic activity included at least one of the following activities in the tourism sector: Short-Term Accommodation Activities, Food Service, and/or Tour Operator Services.

- For the Short-Term Accommodation sub-sector (henceforth, hotels and hostels), the objective of the study was to offer information about establishments in the 14 departments of the country.
- For the Food Service (henceforth, restaurant) and Tour Operator Services (henceforth, tour operators) sub-sectors, the study objective was to offer information exclusively about the population of CASATUR's 2019 members.

The IMPAQ team constructed the sampling frame for the survey using CASATUR's Registry of Associates (*Registro Socios*); the *Corporación Salvadoreña de Turismo* (CORSATUR) 2018 Inventory and the 2016 National Registry of Tourism; and from online booking websites including Booking, Google Travel, and Kayak. In total, for the hotel sampling frame, IMPAQ added 307 establishments to the initial list of 100 from CASATUR's registry. IMPAQ drew the sample of restaurants (89 total) and tour operators (27 total) exclusively from CASATUR's registry, without further supplementation. The sample consists of 523 establishments that includes hotels and hostels, restaurants, and tour operators across all 14 departments in El Salvador.

Preliminary Results

In this section, we present general information about the surveyed establishments as well as demographic data about their workers. We also analyze the characteristics of the key positions in the tourism industry, their educational requirements, core competencies, past and current employment levels, and future demand for staff. We also present information about the state of the sector in context of the COVID-19 pandemic.

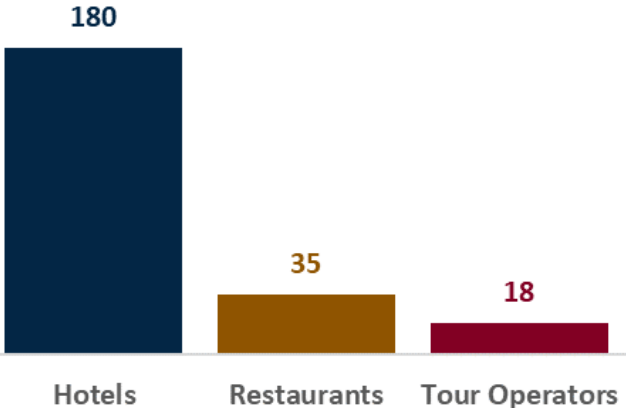
Given the effects of the pandemic on the tourism industry with its associated temporary closures and reduction of personnel amid quarantine, we used 2019 as the reference period for data on workers and jobs. All other data reflects the situation of the surveyed establishments at the time of data collection during the COVID-19 pandemic.

We display the results by type of tourism establishment (i.e. hotels and hostels, restaurants, and tour operators) and/or by region. The data visualizations on occupations represent hotels and hostels only since these establishments constitute the majority of the surveyed establishments. The reader should also note that the results of this survey depict the characteristics of the job positions, not of the workers who occupy these positions.

Estimates of the Number of Establishments

In total, of the 523 tourism establishments we attempted to contact for this study, we successfully surveyed 233 establishments. Of the surveyed establishments, 77 percent (n = 180) were hotels and hostels, 15 percent (n = 35) were restaurants and 8 percent (n = 18) were tour operators (Exhibit 2). With respect to their secondary economic activities, 42 percent of hotels and hostels also reportedly function as restaurants.³

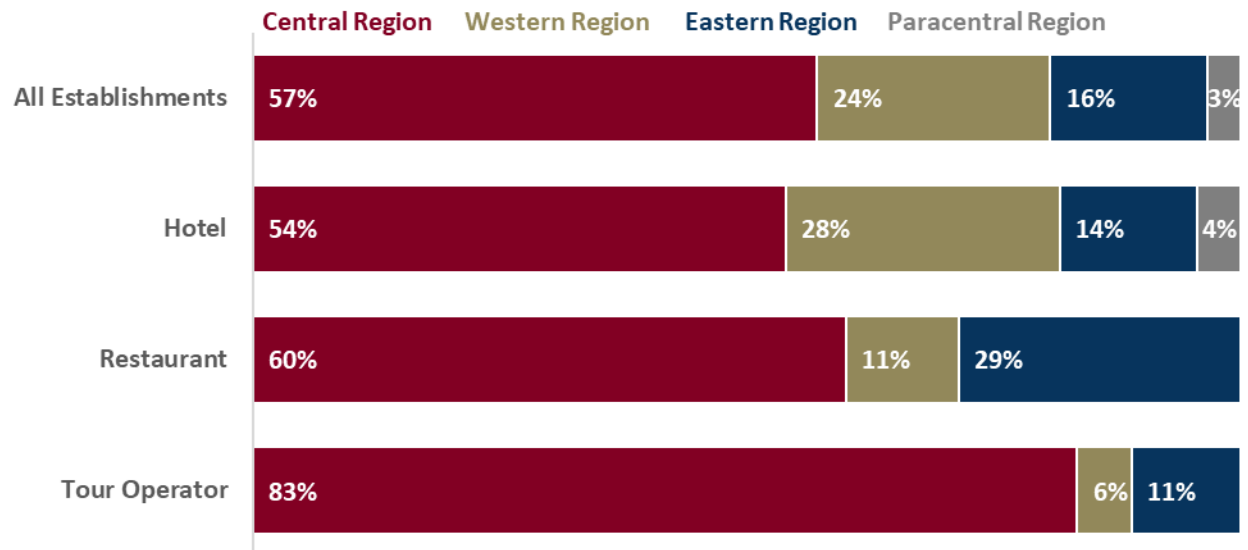
Exhibit 2. Number of Surveyed Establishments, by Establishment Type



As shown in Exhibit 3, most of the surveyed establishments are concentrated in the Central Region (57 percent), which includes the departments of San Salvador, La Libertad, Chalatenango and Cuscatlán.

³ The survey collected information only on the main economic activity of the selected establishment.

Exhibit 3. Distribution of Establishments by Region

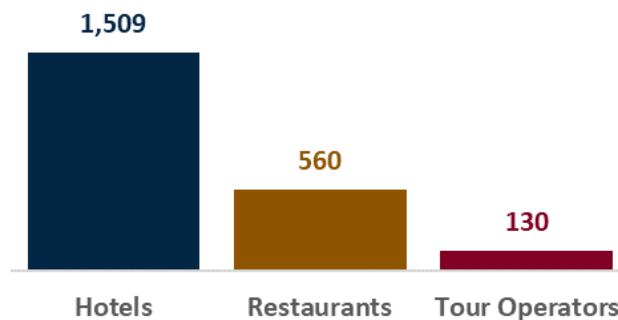


Note: the total number of surveyed establishments in the Paracentral Region was 8. Although robust estimates cannot be made with such a limited sample, results from the Paracentral Region are reported illustrative purposes and are included in all aggregate results.

General Findings about Workers

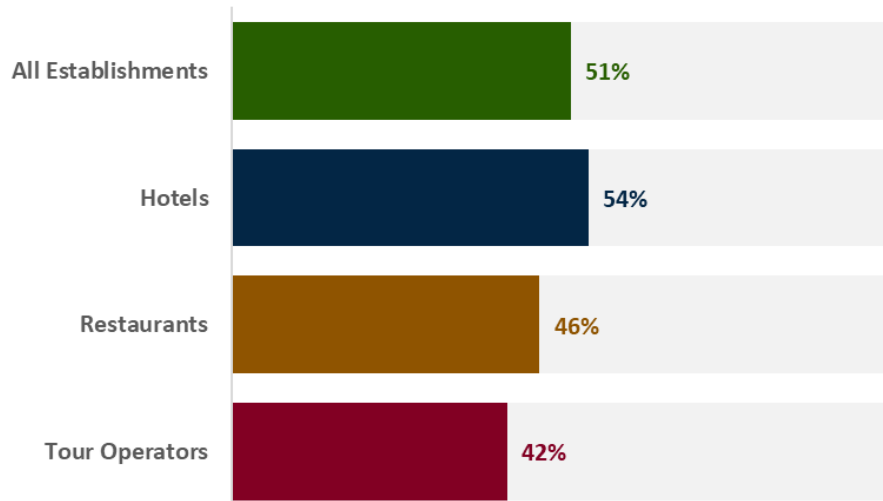
The surveyed tourism establishments reported 2,199 workers in 2019; this includes both full- and part-time employees. Hotels and hostels reported 1,509 workers, which is equivalent to eight employees per establishment (Exhibit 4). Restaurants reported 560 employees in total, representing an average of 16 employees per establishment, while tour operators reported 130 workers, representing an average of seven employees per establishment.

Exhibit 4. Employment in 2019 among Surveyed Establishments, By Type of Establishment



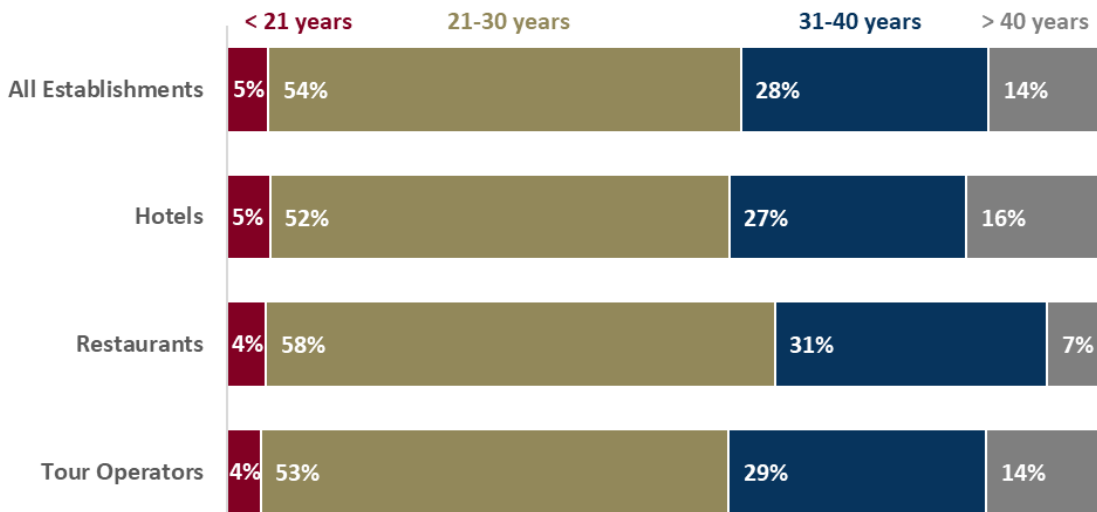
On average, female workers represent 51 percent of staff employed by the tourism establishments (Exhibit 5). This average, however, hides some minor disparities between the different types of tourism establishments. Hotels and hostels have the highest rate of female labor force participation (54 percent), followed by restaurants (46 percent). Tour operators report the lowest level of female staff (42 percent).

Exhibit 5. Female Labor Force Participation Rate in the Surveyed Establishments, by Establishment Type



Regarding the age distribution of the personnel, the most highly represented age group is 0 to 30 years (54 percent), followed by 31 to 40 years (28 percent). Across all tourism establishments, 14 percent of employees are over 40 years old while only five percent of employees are under 21 years of age (Exhibit 6). This distribution is similar among the three types of tourism establishments except for those over 40 years old, which has lower representation among restaurants (seven percent).

Exhibit 6. Worker Age Distribution, by Establishment Type



Key Occupations in the Tourism Industry

In this section, we present the characteristics of key positions in the tourism industry. To conduct this analysis, the IMPAQ team consulted experts in the tourism sector about the most important job positions and the positions with the highest recruitment volume. Through these consultations, IMPAQ narrowed a broad list of tourism sector job positions to 20 key ones. Then, the IMPAQ team asked respondents to choose up to six positions that they consider to be the most common, that is, with the greatest volume of

recruitment.⁴ We present the results in general and for the most common positions among the surveyed tourism establishments. The job-related visuals represent findings for hotels and hostels only due to the comparatively low share of restaurants and tour operators in the survey data.

Most Common Positions

Exhibit 7 shows the job positions with the highest volume of recruitment and the number of personnel employed for each respective position for hotels and hostels. Housekeeping was the most commonly reported position with 33 percent of establishments mentioning it as a high-volume position. Cleaning staff was the second most commonly reported job position (31 percent), followed by waiters (17 percent), cooks (11 percent) and receptionists (nine percent). In total, hotels and hostels reported 232 people employed as housekeeping staff, 135 as cleaning staff, 146 as waiters, 55 as cooks, and 35 as receptionists.

Exhibit 7. Job Positions in Hotels and Hostels, by Recruitment and Employment Level

		Total
Housekeeping	33%	232
Cleaning staff	31%	135
Waiter	17%	146
Cook	11%	55
Receptionist	9%	35

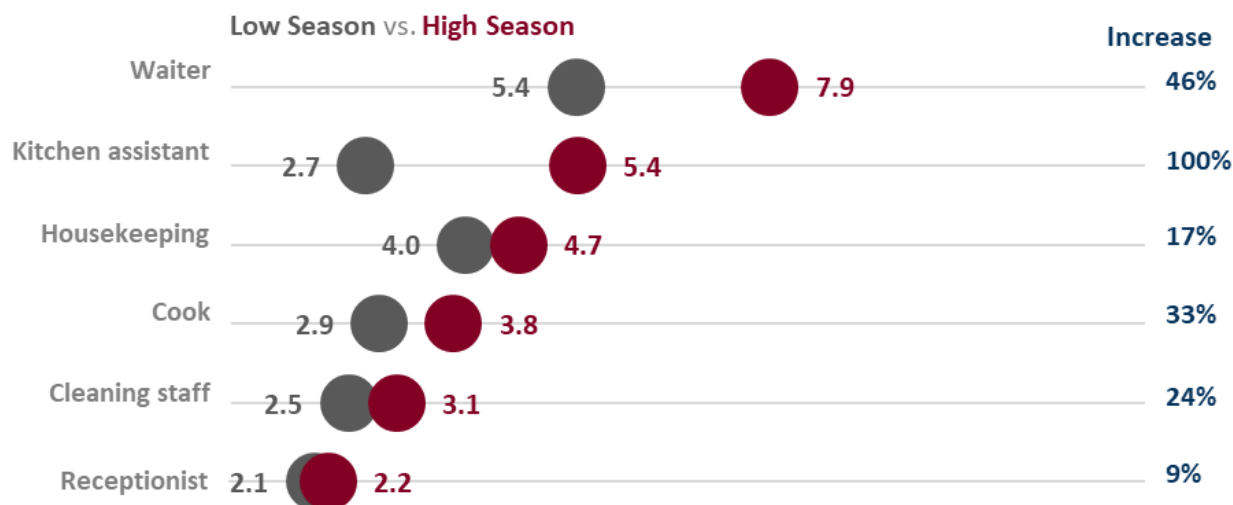
Among surveyed restaurants, the most numerous job positions in 2019 were waiters (58 percent) and cooks (52 percent). Nearly all tour operators (83%) reported tour guides as the job with the highest volume of recruitment.

Number of Workers by Season

The survey asked respondents about average seasonal demand (i.e. high season and low season) for different job positions. When comparing the high and low seasons, demand for kitchen assistants increased more than any other position for hotels and hostels, which reportedly increased from an average of 2.7 workers in low season to 5.4 in high season, representing a 100 percent increase. Hotel and hostel demand for waiters increased by 46 percent, from 5.4 to 7.9 workers on average; demand for cooks increased by 33 percent, from 2.9 to 3.8 workers; and demand for cleaning staff increased by 24 percent. By contrast, demand for receptionists only increased by nine percent (Exhibit 8).

⁴ While establishments had the option to select up to six positions, in some cases, surveyed establishments reported as few as two jobs. The 20 key positions on the list were cook, kitchen assistant, waiter, housekeepers, receptionist, cleaning staff, laundry staff, housekeeping supervisor, maintenance supervisor, purchasing manager, concierge, bellboy, accounting assistant, administrative assistant, computer specialist, tourist product designer, travel agent, tour guide, and van driver. Respondents were also allowed to select “other” to specify job positions not listed. Respondents also had the option to report other requirements not included in the list.

Exhibit 8. Average Number of Workers in Hotels and Hostels, by Season and Job Position



For surveyed restaurants, the increase in seasonal demand was similar to hotels and hostels for kitchen assistants, demonstrating a 100 percent increase (3.5 workers in low season to 7.0 workers in high season). Changes in seasonal demand for cooks and waiters was less pronounced, with a 17 percent increase for cooks (6.6 workers in low season and 7.7 in high season) and a 34 percent increase for waiters (8.6 in low season and 11.5 in high season). Among restaurants, the increase in seasonal demand for cleaning staff (43 percent) and other job positions (62 percent) was higher compared to the demand at hotels and hostels.

Among surveyed tour operators, the seasonal demand increase for tour guides is 73 percent, which represents an average of 3.7 employees in low season and 6.3 in high season.

Tourism Sector Remuneration

The average national salary in El Salvador in 2019 was 344 USD per month. In the “commerce, hotels, and restaurants” sector, the average 2019 salary was 325 USD per month.

Exhibit 9 shows monthly average remuneration rates, disaggregated by establishment type. There are marked differences in salary ranges among the three establishment types. More than half of hotels and hostels (56 percent) offered an average salary between 300 and 399 United States Dollars (USD) per month while only 22 percent of tour operators offered the same average range. Tour operators’ distribution of remuneration varied more offering the same proportion of salaries equal to or greater than 400 USD (39 percent) and less than 300 USD (39 percent) per month. It is important to note that each salary range includes base salary, overtime, benefits, in-kind remuneration, and other types of remuneration. The average national salary in El Salvador in 2019 was 344 USD per month. In the “commerce, hotels, and restaurants” sector, the average 2019 salary was 325 USD per month.⁵

⁵ <http://www.digestyc.gob.sv/index.php/temas/des/ehpm/publicaciones-ehpm.html?download=724%3Apublicacion-ehpm-2019>

Exhibit 9. Monthly Salary Range, by Establishment Type

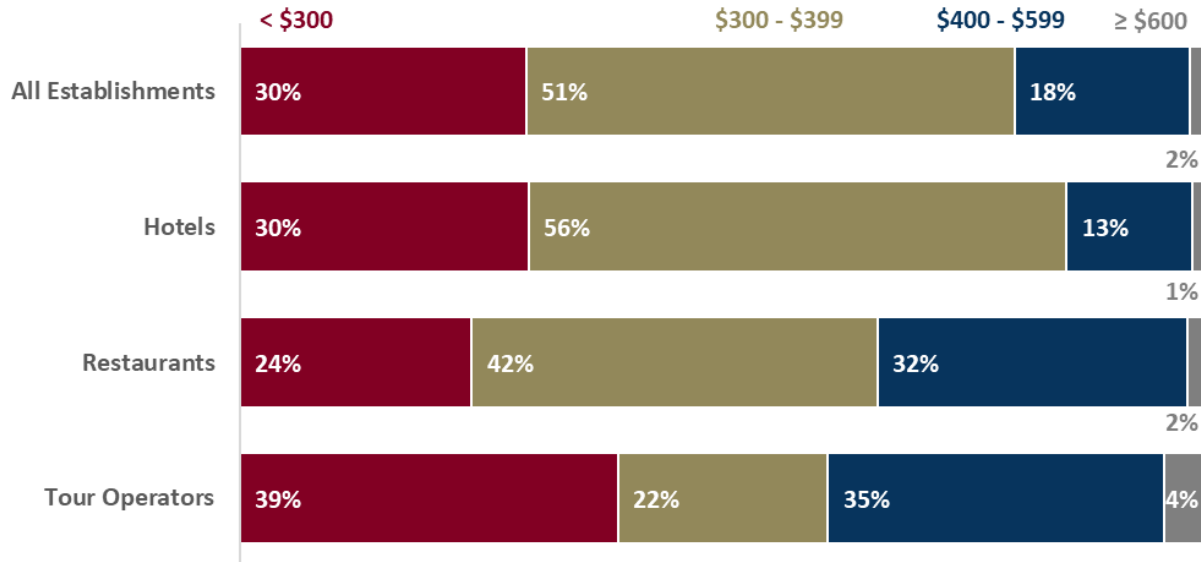
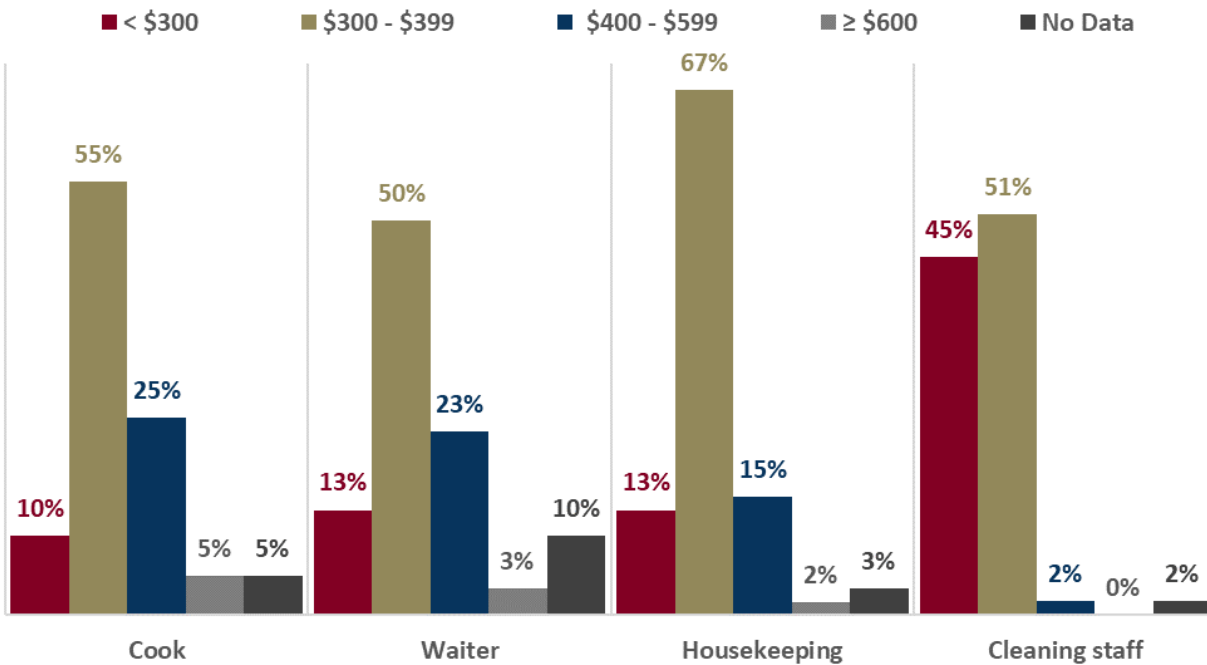


Exhibit 10 shows average salaries offered for the four most frequently mentioned job positions among hotels and hostels. For each of the most common job positions, more than half of the surveyed hotels and hostels reported a salary range between 300 and 399 USD on average per month. On average, cleaning staff are offered less than the other three most common occupations mentioned by hotels and hostels, with 45 percent earning less than 300 USD. Cooks and waiters, on the other hand, had the highest proportion of salaries equal to or greater than 400 USD on average (30 percent and 26 percent, respectively).

Exhibit 10. Monthly Salary Range Among Hotels and Hostels, by Job Position



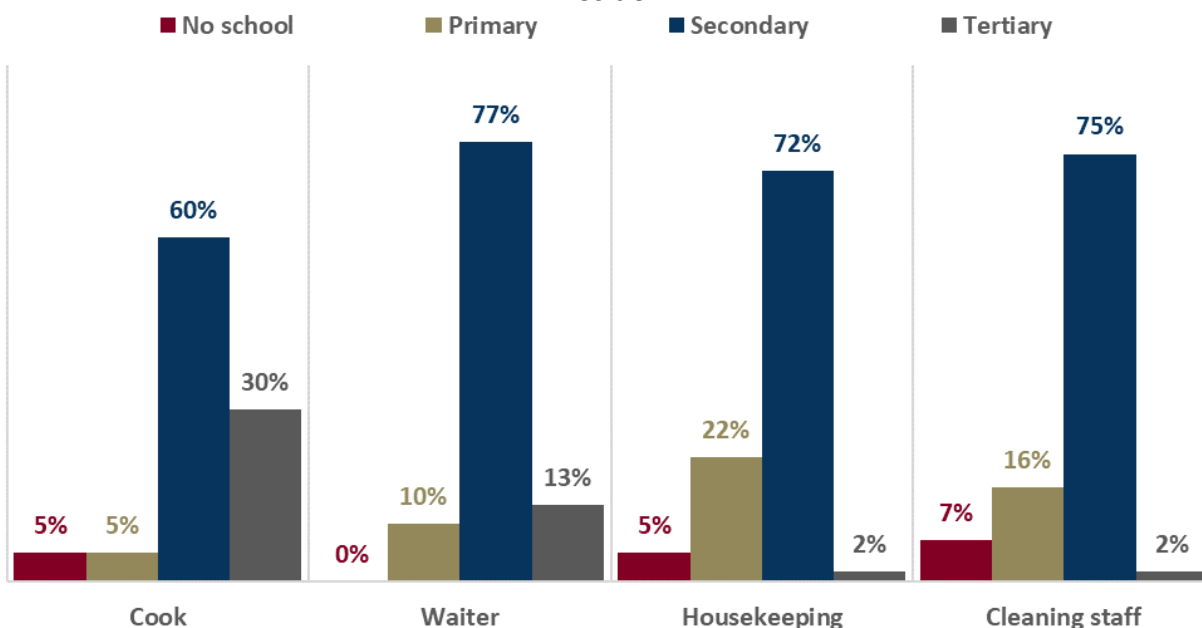
Among surveyed restaurants, the proportion of cooks offered a salary range equal to or greater than 400 USD (42 percent) is higher relative to the proportion offered at hotels and hostels, which is 30 percent as

noted above. However, restaurants reportedly offer cooks a larger proportion of salaries that are less than 300 USD (26 percent). For waiters working in restaurants, the distribution of salary ranges is similar to their counterparts in hotels and hostels: nearly half (48 percent) are offered salaries between 300 and 399 USD while one-third are offered salaries equal to or greater than 400 USD.

Academic Training, Competencies, and other Requirements

Exhibit 11 shows the average educational requirements for hotel and hostel employment for the job positions with the highest volume of recruitment. Among the surveyed hotels and hostels, the educational requirements are relatively high: at least 60 percent require secondary education for each of the four most numerous job positions (Exhibit 11). Also, among the hotels and hostels that reported cooks as one of their most numerous occupations, the proportion that require tertiary education is relatively high (30 percent). On the other hand, nearly a quarter of housekeeping (27 percent) and cleaning staff (23 percent) positions require no more than a primary education.

Exhibit 11. Minimum Required Academic Training Among Surveyed Hotels and Hostels, by Job Position

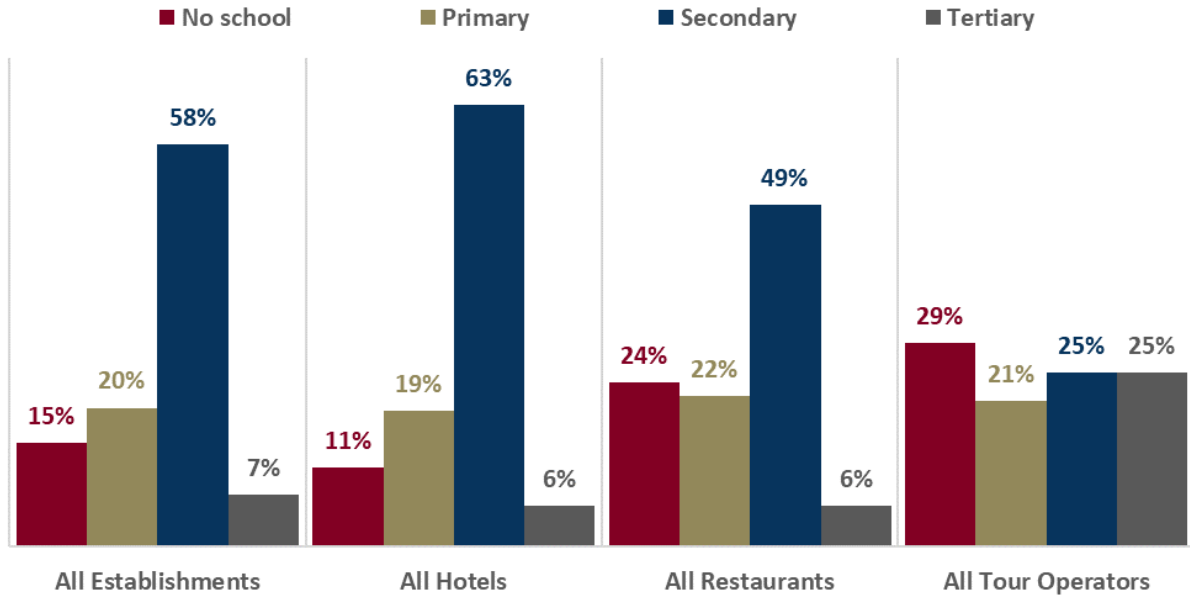


Note: The category tertiary refers to technical/vocational training and incomplete university education. None of the establishments reported that they required complete university education among the most numerous job positions.

For restaurants, the educational requirements for waiters and cooks mirror hotels and hostels with some minor differences. Of the surveyed restaurants that reported these positions among the most common occupations for their establishments, 42 percent require secondary education for cooks and 57 percent require the same for waiters; similarly, 26 and 19 percent require tertiary education for cooks and waiters, respectively. While 11 percent reported that cooks do not require any formal education, none reported this as the minimum level of education for waiters.

Upon analyzing minimum required education by establishment type, more than half of hotels and hostels (63 percent) and nearly half of restaurants (49 percent) require secondary education for occupations they report as most numerous (Exhibit 12). Of all establishment types, tour operators report the largest proportion of employees that require tertiary education (25 percent) and no formal education (29 percent), demonstrating great variation in educational requirements across the surveyed tour operators.

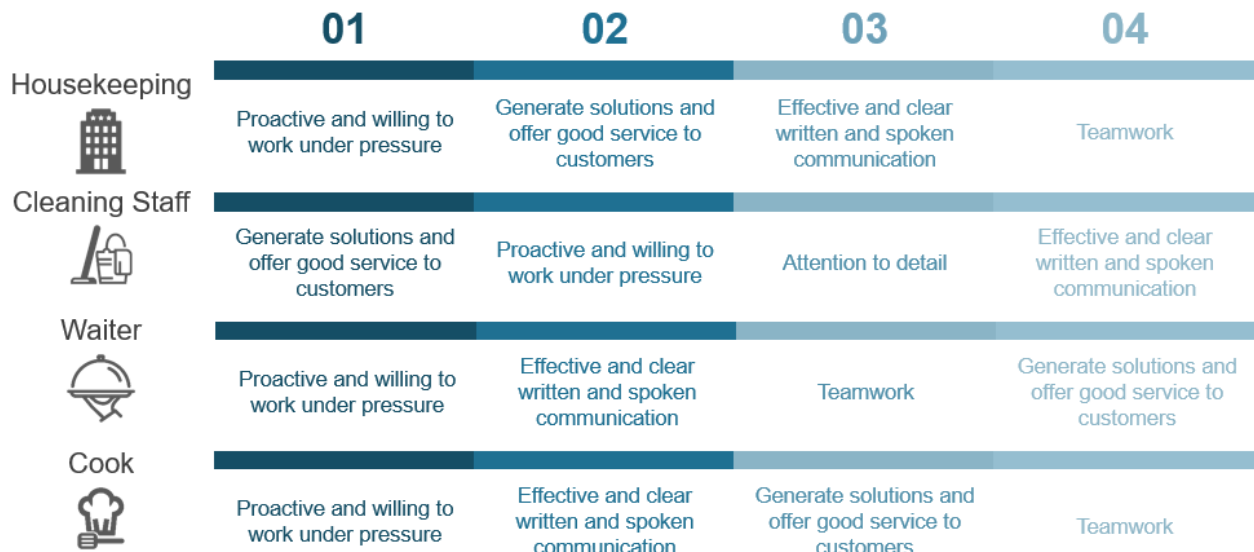
Exhibit 12. Minimum Required Academic Training, by Establishment Type



Note: The category tertiary refers to technical university and incomplete university education. None of the establishments reported that they required complete university education among the most numerous job positions.

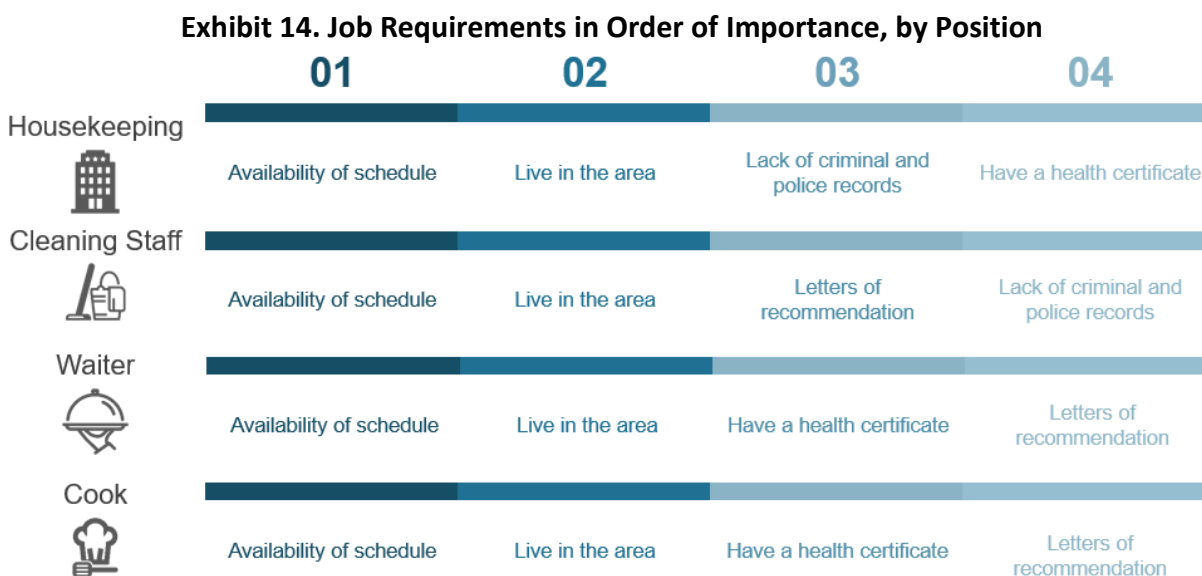
IMPAQ asked respondents to report on the most important skills⁶ for employees in different job positions. The most important required skill for housekeeping, waiters, and cooks was *being proactive and willing to work under pressure*. For cleaning staff, the most important skill was to *generate solutions and offer good service to customers*. Other skills that were highly important among the most common job positions was *effective and clear written and spoken communication, attention to detail and teamwork* (Exhibit 13).

Exhibit 13. Required Skills in Order of Importance, by Job Position



⁶ Establishments had the option to select up to five required skills per job position that they identified as most numerous. The ten key job skills listed in the survey included 1) knowledgeable about topics that improve job performance, 2) effective and clear written and spoken communication, 3) knowledge and information dissemination, 4) proactive and willing to work under pressure, 5) innovative 6) leadership abilities, 7) time-management, 8) generate solutions and offer good service to customers, 9) attention to detail, and 10) teamwork. Respondents also had the option to report other skills not included in the list.

Exhibit 14 shows the requirements⁷ for each job position. The most important requirements across the four most common job positions were *availability of schedule* and *live in the area*. Other important requirements were *having a health certificate* followed by *letters of recommendation*, and *lack of criminal and police records*.



The State of the Tourism Sector Amid the COVID-19 Pandemic

Given that data collection for this survey occurred during the COVID-19 pandemic, the results partially reflect changes in demand in the tourism sector and the labor market related to quarantine and its associated restrictions on movement. Exhibit 15 demonstrates a dramatic decrease in the hotel and hostel occupancy rate between 2019 and 2020. While most hotels and hostels were surveyed between September and November 2020, which represents the period *after* the reopening of the economy in El Salvador in August 2020, the survey results suggest tourism demand was slow to recover to 2019 levels. On average, the 2020 occupation rate was 34 percent across all regions. In comparison, the average occupation rate in 2019 was 72 percent.

Exhibit 15. Change in the Occupancy Rate among Hotels and Hostels, by Region

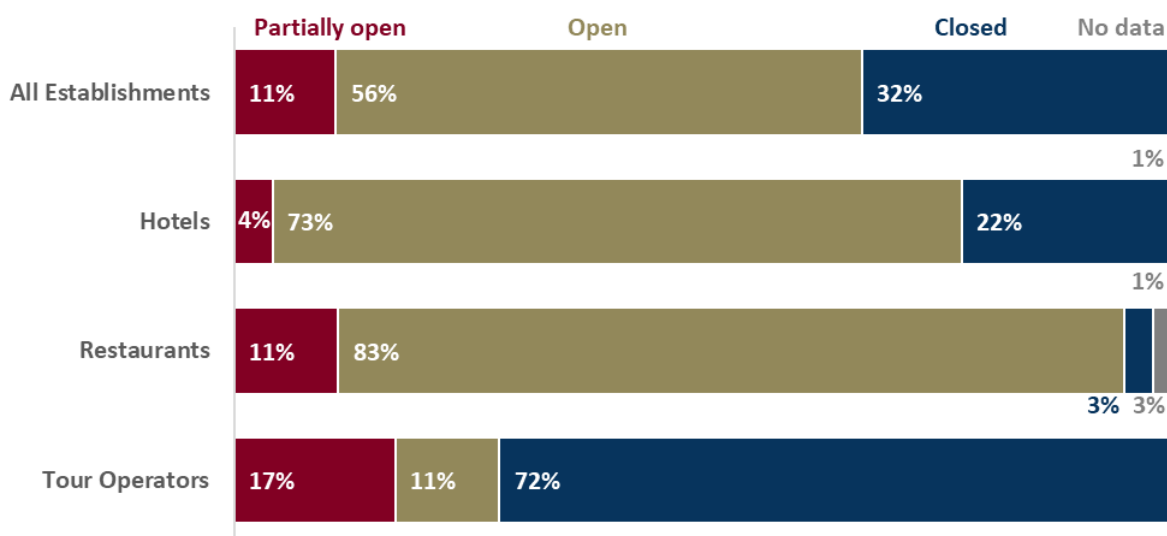
Region	Occupation Rate		Reduction in Occupation Rate
	2019	2020	
Central Region	72%	32%	-55%
Western Region	73%	25%	-66%
Eastern Region	67%	39%	-41%
Paracentral Region*	76%	41%	-46%

Note: The total number of surveyed establishments in the Paracentral Region was eight. Although robust estimates cannot be made with such a limited sample, results from the Paracentral Region are reported for illustrative purposes.

⁷ Establishments had the option to select up to five job requirements per job position that they identified as most numerous. The twelve key job requirements listed in the survey included 1) live in the area, 2) know a second language, 3) basic computer skills, 4) have a health certificate, 5) ability to use specialized tools, 6) job-related certifications, 7) letters of recommendation, 8) membership in a professional association, 9) availability of schedule, 10) availability to travel within and outside the country, 11) drivers license, and 12) lack of criminal and police records. Respondents also had the option to report other requirements not included in the list.

Despite the reduction in the occupation rate among hotels and hostels, most that responded⁸ to the survey were open when contacted for the survey while a vast majority of tour operators were closed (Exhibit 16). Nearly all surveyed restaurants (94 percent) were open or partially open at the time of the survey.

Exhibit 16. Capacity to Receive Clients, by Establishment Type

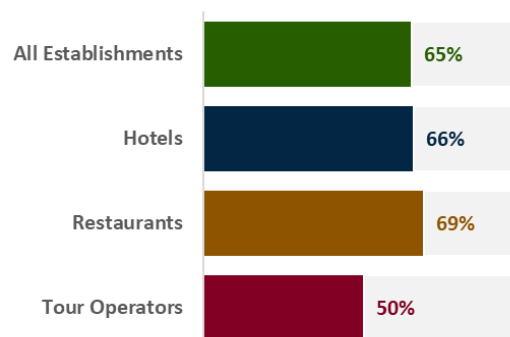


The tourism establishments that were completely or partially open when surveyed undertook various measures to remain open and reduce their pandemic-related economic losses in 2020. The most common measures were suspending contracts (24 percent), other measures (21 percent) and the reduction of hours and/or employee work schedules (15 percent). Examples of other measures include delivery services and participation in the government program *Hoteles Solidarios*.⁹ Only eight percent of surveyed establishments that were partially or completely open reported firing staff as a coping measure.

Changes in Personnel Demand

The results in this section highlight employer expectations for personnel needs in the next twelve months. As shown in Exhibit 17, 65 percent of all tourism establishments surveyed indicated that they would require more staff during this time span. When analyzing the projected increase in demand by establishment type, 69 percent of restaurants, 66 percent of hotels and hostels and 50 percent of tour operators expect increased demand for staff in the

Exhibit 17. Proportion of Establishments that Project Increased Staff Demand, by Establishment Type



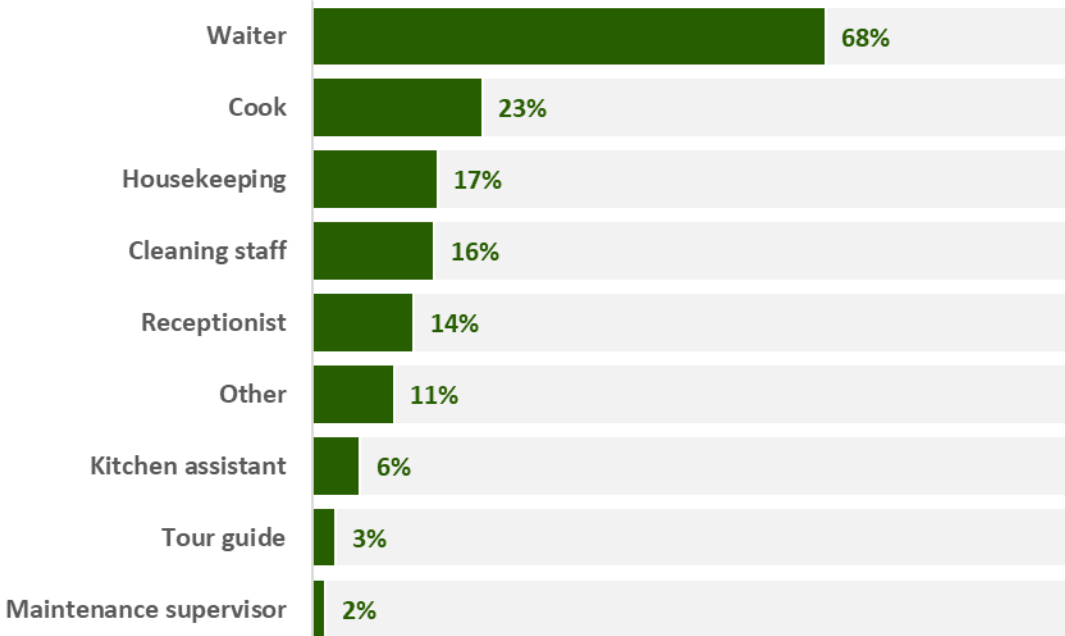
⁸ Of the establishments that did not respond to the survey, only 17 (one percent of all establishments in the sampling frame) reported they were closed due to the COVID-19 pandemic. Nevertheless, enumerators were not able to contact 39 percent (n = 205) of the establishments in the sampling frame. Although this non-response does not signify that these establishments closed their operations, it illustrates that it is not clear how many establishments were closed at the time of the survey.

⁹ *Hoteles Solidarios* is a network of hotels that make their facilities available to the public and medical professionals at a “solidarity price,” serving as ad hoc treatment centers for people infected with COVID-19. Participating hotels provide lodging accommodation and food services.

following twelve months. This increase in demand could be due in part to employment loss during the pandemic and to expectations for increased demand for tourism services.

Exhibit 18 shows the job positions that will experience the greatest demand in the next twelve months among tourism establishments surveyed. Waiters (68 percent), cooks (23 percent), housekeeping (17 percent), and cleaning staff (16 percent) were mentioned most frequently. Interestingly, respondents reported a need for other occupations (11 percent) such as personnel responsible for customer service and marketing.

Exhibit 18. Proportion of Establishments that Project Increased Staff Demand in the Next Twelve Months, by Job Position



Final Reflections

El Salvador's wealth of natural and cultural resources, including many known archaeological sites and unique ecological areas, strategic location, and access to many markets give it significant potential for growth in the tourism sector.¹⁰ The tourism sector includes an extensive productive value chain that ranges from tour operators, transport, hoteliers, tour guides, restaurants, among others; each of the which contributes to the dimensions of sustainable development and the creation of employment and opportunities economic.

In this report, we presented our analysis of responses to a survey administered in the tourism sector in El Salvador, with a focus on hotels and hostels. The report provided information on the key job positions in the sector, labor demand, and training needs. We collected information in all 14 departments of El Salvador, with most of the surveyed establishments concentrated in the Central Region (54 percent of hotels and hostels), which includes the departments of San Salvador, La Libertad, Chalatenango, and Cuscatlán. In our analysis of the survey data, two characteristics stand out: i) the most representative age group among workers in hotels and hostels is that of 21 to 40 years, which accounts for 79 percent of reported workers; ii) female labor participation in hotels and hostels is important: it accounts for the 54 percent of the reported workforce.

Among hotels and hostels, the key positions with the highest volume of hiring reported were: housekeeping, cleaning staff, waiter, cook, and receptionist. Interestingly, the position with the highest increase in hiring during the high season was that of kitchen assistant. Although it is not one of the most common positions listed, it sees a 100 percent increase during the high season, followed by waiter, which sees a 46 percent increase. Also noteworthy are the salaries offered in the sector: across only the top four most common jobs (housekeeping, cleaning staff, waiter, and cook), 86 percent of the hotel and hostel establishments reported offering a salary equal to less than 399 USD per month, while only one percent indicated that they offer equal to or greater than 600 USD per month. Regarding academic training requirements, it was reported that at least 60 percent of hotels and hostels require secondary education for each of the four most numerous job positions.

¹⁰ <https://www.worldbank.org/en/country/elsalvador/overview#1>

Annex A: COVID-19 in El Salvador

El Salvador reported its first case of COVID-19 on March 18th, 2020. When data collection began on August 23, El Salvador reported 24,622 cases, and when data collection concluded at the end of December, there were 45,960 reported cases.¹¹ As of the end of 2020, there were 45,960 cases reported. To date, the death rate in El Salvador is one of the highest worldwide, at about 3.03%.

El Salvador originally went into quarantine on March 14, 2020, before there were any confirmed COVID-19 cases in the country, and it was extended for another 15 days on April 20. This allowed for residents to leave their homes twice a week to purchase food, but included little else.¹² On May 18, 2020, the Supreme Court struck down President Bukele's decree to further extend the state of emergency. At present, there is no national curfew nor internal travel restrictions, but the Salvadoran Ministry of Health has the authority to place municipalities under special quarantine with little to no prior notice when a high number of COVID-19 cases is detected.¹³

In the May through August 2020, El Salvador opened its airport slowly to cargo flights, and resumed food delivery and other small economic activities.¹⁴ The country fully reopened its economy on August 24, following the Supreme Court's decision rejecting an executive decree on a phased economic reopening.¹⁵ In-person classes for schools and universities remain suspended indefinitely.¹⁶ The international airport was reopened on September 18 for all travelers with enhanced health protocols.

¹¹ <https://covid19.gob.sv/>

¹² <https://www.npr.org/2020/06/18/880513781/what-the-coronavirus-lockdown-looks-like-in-el-salvador>

¹³ <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19#E>

¹⁴ <https://www.usnews.com/news/world/articles/2020-06-16/el-salvador-loosens-tightest-pandemic-restrictions-in-region>

¹⁵ Ibid.

¹⁶ <https://sv.usembassy.gov/covid-19-information/>