

Colombia

Tourism in the economy

The tourism sector currently contributes 2% to Colombia's GDP. Tourism has become the primary services export in Colombia and the second overall export behind the oil industry, generating 52% of foreign exchange. According to the National Administrative Department of Statistics, the travel and tourism sector supported 2 million jobs in Colombia in 2018 including 19% of new jobs. It has established businesses in 281 municipalities across the country.

In 2018, Colombia received 4.3 million inbound visitors, a growth of 7.7% compared to 2017. The main countries of origin were the United States, Venezuela and Argentina. In the first four months of 2019, about 80% of tourism spending was derived by visitors from the American continent.

In 2018, 23.3 million domestic trips were recorded, up 4.0% compared to 2017. Between January and September 2019, more than 17 million domestic air passengers were recorded, representing an increase of 0.2% from the same period in 2018.

Tourism governance and funding

The Ministry of Commerce, Industry and Tourism aims to improve regional competitiveness and sustainability, as well as generate added value and consolidate the country's presence in both the domestic and international tourism markets. It is comprised of three Vice-Ministries covering Business Development, Foreign Trade and Tourism.

The mission of the Vice-Ministry of Tourism is to work with tourism destinations and providers to position Colombia as a sustainable tourist destination, known for its diverse and multicultural offer, represented by highly competitive products and services that empowers regional development.

The main functions of the Vice-Ministry of Tourism are as follows:

- To formulate, implement and evaluate tourism policy, and related plans and programmes in conjunction with the public and private sectors.
- To design and ensure the implementation of the 2018-22 Tourism Sector Plan.
- To co-ordinate the National Tourism Register, the Tourist Information System and the certification system related to the provision of hotel services.
- To regulate the industry, as well as addressing complaints by tourism service providers covered by existing legislation.

In 2013, legislation was put in place to ensure robust co-ordination of tourism programmes and projects. This created the Superior Tourism Council, representing 13 different ministries and other agencies to ensure a whole of government approach to tourism development.

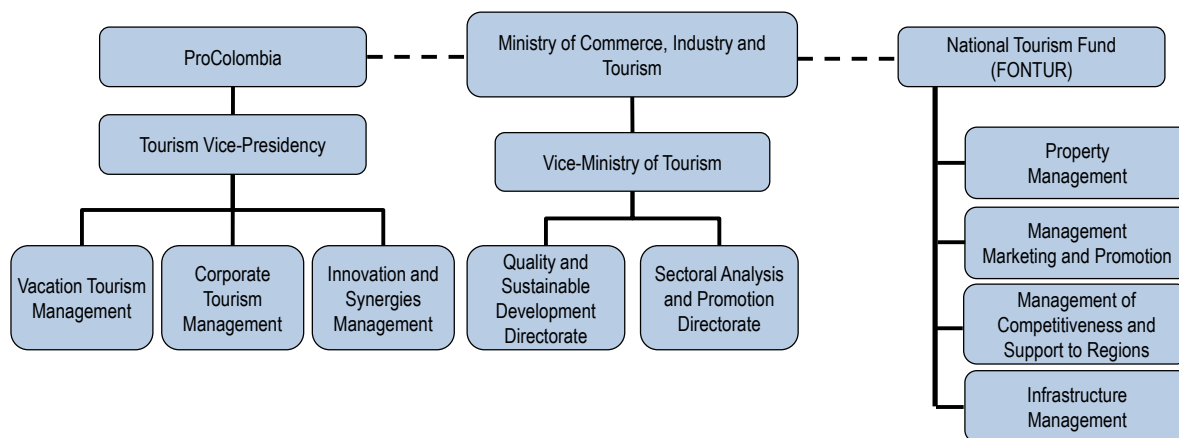
Regional and local authorities are responsible for developing tourism activities in their territories. The majority of departments have an office or authority in charge of tourism issues. The 32 departments are

obliged to carry out a tourism development plan, which serves to gather, systematise and process information from the communities involved in local tourism. Each department aligns to and applies the policy guidelines developed by the Vice-Ministry of Tourism for the improvement of competitiveness and sustainability in their territories. The Ministry co-ordinates a series of planning activities with regional and local authorities, and seeks to identify priorities for collaboration within the public sector over a three-year period.

In addition, the Ministry has created a Consultative Tourism Council as an advisory body to government. Membership is wide ranging and currently comprised of six representatives from the tourism industry, including delegates from travel agencies, food industry, theme parks, transportation companies, hotels, and universities. Additionally, the Council has representation from the public institutions ProColombia, The National Tourism Fund and the Ministry. The objectives of the Consultative Tourism Council are to advise the Ministry of Commerce, Industry and Tourism on the formulation of policies, programmes and projects, promote economic co-operation agreements, recommend actions that enable permanent co-ordination between the public and private sectors, analyse the national and international performance of the tourism sector, and recommend strategies for tourist safety and security.

Funding comes from various sources, including the general budget, obligatory contributions from tourism service providers, income from tourism properties and brands owned by the government, and a USD 15 tourism tax on international air arrivals, collected at the time of ticket booking. In 2019, the national budget was COP 298.6 million, representing a significant increase from the 2018 budget of COP 132.1 million.

Colombia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Commerce, Industry and Tourism, 2020.

Tourism policies and programmes

The overall objective of the Tourism Sector Plan 2018-22 "Tourism: the purpose that unites us", is to improve Colombia's competitiveness as a tourist destination. The Plan establishes six major strategic lines that address the main bottlenecks in the tourism sector in the medium and long term.

These are:

- Generating the institutional conditions for the promotion of the tourism sector,
- Managing destinations and strengthening the country's tourism offer,
- Promoting more investment, better infrastructure and connectivity for tourism,

- Fostering innovation and business development in the tourism sector,
- Strengthening human capital for tourism competitiveness,
- Promoting transformative, inclusive and equitable tourism.

The Colombian government has established four tourism goals for 2022:

- Increase accommodation and food services contribution to GDP by 19% to COP 39.2 billion.
- Increase services exports in the passenger travel and transport account from USD 6.6 million to USD 8.2 million.
- Increase the number of non-resident overnight visitors from 4.3 million to 6 million.
- Increase the number of passengers arriving from international cruises to a total of 450 000.

The Vice-Ministry of Tourism is committed to moving sustainability from the side-lines to the core of decision making in tourism practices and policies. It also plans to adopt a measurement framework and set of comprehensive indicators to monitor the performance of the tourism sector with reliable, timely and sufficient data. The Vice-Ministry has developed a Quality standard Policy based on tourism legislation that seeks to improve the quality of the provision of tourism services. The goal of the Quality Policy is to create a culture of excellence in tourism operations and position Colombia as a distinct, competitive, and sustainable destination. The Policy is applied throughout 59 national quality and sustainability standards for the certification of all major tourism services. In 2019, there were 1 229 certified tourism service providers and 21 certified sustainable tourism destinations.

In partnership with the Ministry of Defence, the Vice-Ministry of Tourism co-ordinates the Tourism Police, a specialised body to ensure security and safety for the users and clients of tourism services, and the supervision of tourism activity in the public and private sectors. The Tourism Police is a branch of the National Police and reports directly to the Ministry of Defence, which finances the programme.

The Vice-Ministry of Tourism is also developing a digital transformation policy in response to challenges faced as a result of advancing technology. This includes a series of guidelines on: (i) the use of new channels for purchase and sale; (ii) the systematisation of information and predictive data in the business tourism sector; (iii) the regulation of new technology-based actors involved in tourism; and (iv) the digital promotion of content on attractions, products and experiences.

Ensuring tourism investment for peace and security in Colombia

Since its implementation in 2014, the Tourism and Peace Programme has contributed to the sustainable development of 132 towns and cities in 27 departments affected by Colombia's past armed conflict. It has also implemented nine Management and Governance Models and launched the Tourism Reincorporation Route. More than 2 800 people have benefited from this route, and it has resulted in the creation of 424 companies and investment of USD 10.2 million in infrastructure, competitiveness and promotion projects. Colombia changed its laws to attract domestic and foreign investors to develop large tourism projects. Changes include tax incentives for hotel construction and major projects, and the exclusion of VAT on certain air routes to promote domestic tourism, and on cultural, sports and other events. A rent incentive of 9% is offered for the construction of new hotels, and a special low tax of 9% is available for projects focusing on the development of theme parks, nautical docks, and ecotourism and agritourism programmes. By 2022, Colombia expects an increase of 51% in the value of investments being made by international companies.

Statistical Profile

Colombia: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	20 103	22 238	23 179	22 416	23 316
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	2 866	3 252	3 559	3 976	4 282
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
United States	377	446	499	529	648
Venezuela	273	306	288	371	399
Argentina	118	126	135	186	198
Brazil	125	138	182	209	197
Ecuador	127	152	167	169	164
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	3 911	3 862	3 795	4 017	4 368
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
United States	1 235	1 256	1 291	1 242	1 383
Spain	196	221	319	362	427
Panama	416	407	409	424	404
Ecuador	348	320	286	301	300
Venezuela	523	372	110	174	165
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	4 887	5 236	5 585	5 881	6 618
International travel receipts	3 825	4 245	4 523	4 921	5 557
International passenger transport receipts	1 062	991	1 062	961	1 061
Outbound tourism					
Total international expenditure	5 175	4 820	4 824	5 134	5 626
International travel expenditure	4 683	4 318	4 254	4 475	4 824
International passenger transport expenditure	492	502	571	660	801

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078300>

Colombia: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	31 279	1 783 161	1 817 999	1 823 931	1 902 944	1 974 185
Accommodation services for visitors	..	101 863	113 025	112 168	113 908	114 035
Hotels and similar establishments	19 901	..	..	..	..	..
Food and beverage serving industry	1 247	633 533	628 298	642 411	662 960	707 426
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	600	..	..	..	..	..
Water passenger transport	..	..	..	..	..	..
Passenger transport supporting services	..	657 991	676 283	667 868	734 263	764 695
Transport equipment rental	209	..	..	..	..	..
Travel agencies and other reservation services industry	6 925	24 094	26 296	30 325	33 823	28 584
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	2 397	365 680	374 097	371 159	357 988	359 444
Other industries	..	..	..	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078319>

Colombia: Internal tourism consumption

Million COP

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	10 332	11 173	21 505
Tourism characteristic products	8 894	10 750	19 644
Accommodation services for visitors	1 800	2 416	4 216
Food and beverage serving services	2 709	2 975	5 684
Passenger transport services	..	..	..
Air passenger transport services	1 455	2 041	3 496
Railways passenger transport services	..	..	..
Road passenger transport services	1 245	1 272	2 517
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	29	..	29
Travel agencies and other reservation services industry	116	87	203
Cultural services	404	438	842
Sports and recreation services	..	..	..
Country-specific tourism characteristic goods	1 136	1 521	2 657
Country-specific tourism characteristic services	..	..	..
Other consumption products	1 438	423	1 861
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078338>



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