

Peru

Tourism in the economy

The tourism sector contributes 3.9% of Peru's GDP, and generates 1.4 million jobs (direct and indirect), representing 7.9% of the economically active population. Foreign currency revenue from tourism in 2018 totalled PEN 16.4 billion, an increase of 7% from 2017 and making tourism the third largest foreign currency generator in Peru.

In 2018, international tourist arrivals (overnight visitors) to Peru reached 4.4 million, a growth of 9.6% compared to 2017. The main international source market for Peru is Chile, representing 26.2% market share, with a 5.3% growth in the number of arrivals in 2018 compared with the previous year. The United States is the second largest market, with a 14.5% share and an increase of 7.1% from 2017. Ecuador, Argentina and Colombia combined make up a further 16.5% of the inbound market. On average, international tourists spend 10 nights in Peru.

In 2018, the total number of trips made by residents in the country was 45.5 million. In the domestic tourism market, Lima, Ica and Piura were the top three cities visited by residents in 2018, with shares of 27%, 12% and 8% respectively. Most domestic tourists (74%) visited destinations outside their region with average trip spending of PEN 484 per person on a four-night trip.

Tourism governance and funding

The Ministry of Foreign Trade and Tourism is the lead political and administrative authority for the tourism sector, its role being to define, direct, execute, co-ordinate and supervise the country's foreign trade and tourism policy in harmony with the general policy of the Peruvian State.

The Vice Ministry for Tourism sits under the Ministry of Foreign Trade and Tourism, and oversees the General Directorate of Tourism Development Policy, which is responsible for implementing, evaluating and supervising compliance within tourism sector policy. The Directorate also formulates, co-ordinates and implements actions aimed at improving the quality of tourism services, environmental management, tourism facilitation, tourist protection, and tourism culture promotion. The Vice Ministry for Tourism also oversees General Directorates of: Research and Studies on Tourism and Handicrafts; Tourism Strategy; Crafts; and Casino Games and Slot Machines.

In addition, The Ministry of Foreign Trade and Tourism has two Specialised Advisory Bodies, comprised of between 6 and 12 members: the Tourism Advisory Committee and the National Council for Handicraft Development. Two further bodies attached to the Ministry are the Tourism Training Centre, and the Exports and Tourism Promotion Board of Peru. As of 2019, Peru's Commercial Offices Abroad are operated under the Tourism Promotion Board, and no longer directly under the Ministry of Foreign Trade and Tourism.

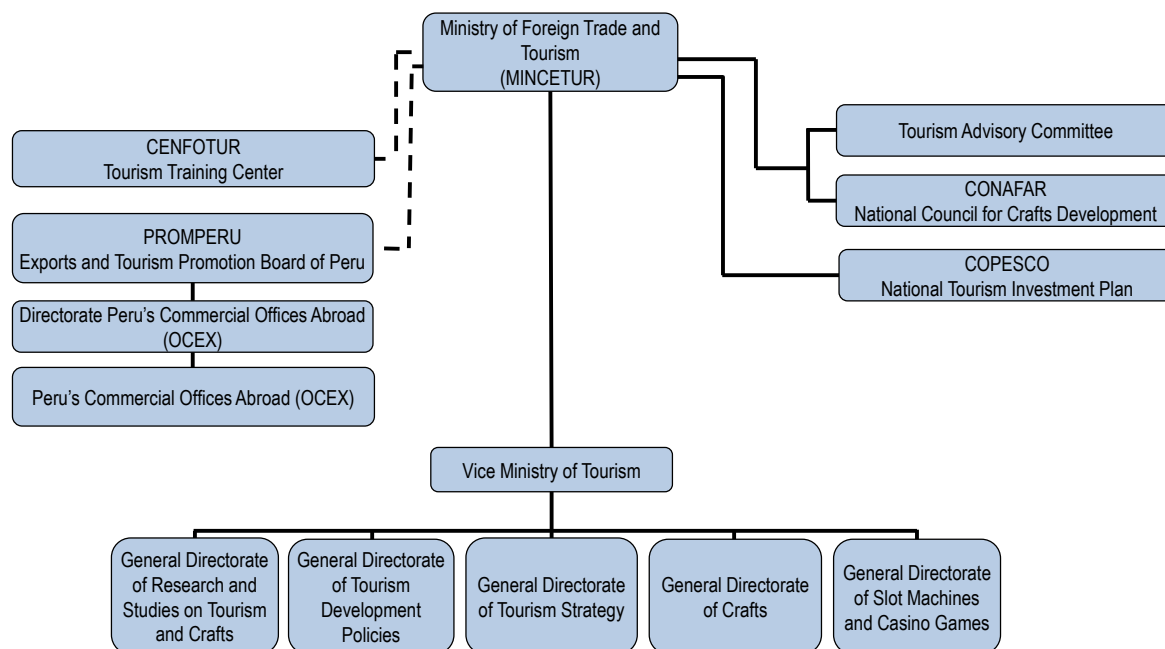
The General Government is responsible for the design and monitoring of national and sectoral policies (as is the case for all States of all levels in Peru). The Government establishes co-ordination mechanisms with regional governments, local government and other entities as required and appropriate to the nature of

each policy. Compliance with national and sectoral policies of the State is the responsibility of the authorities of the national, regional and local governments.

In terms of tourism, Regional Governments are responsible for: formulation, approval and execution of policies relating to the development of regional tourist activity; qualification of regional tourist service providers; co-ordination with local governments on tourism activities, and; maintaining and updating directories of tourism service providers, tourism resources, and regional events calendars.

The 2019 budget for tourism was PEN 600 million, of which 66% was allocated to the National Government, 17% to the Regional Government, and 17% to the Local Government. At the national level, the tourism sector has three entities: the Ministry of Foreign Trade and Tourism, responsible for managing the implementation of policies on tourism; the Tourism Promotion Board; and the Tourism Training Centre. Their budgets for 2019 are PEN 232 million, PEN 78.6 million and PEN 6.1 million, respectively. The Ministry also oversees an entity specialising in the implementation of investment projects in the tourism sector, the Special Commission to Co-ordinate and Supervise the Cultural Tourism Plan Peru - UNESCO (or, the COPESCO Plan), which receives a budget of PEN 13.1 million, representing 16% of the Ministry of Foreign Trade and Tourism's total budget.

Peru: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Foreign Trade and Tourism, 2020

Tourism policies and programmes

Current policy issues are tourist safety and the formalisation of tourist service providers. Other challenges for tourism in Peru include the rise of the middle class in many emerging markets and changing attitudes of people towards travel, as well as efficiency of travel and international mobility. Priority areas include the development and advancement of tourist infrastructure, travel facilitation and the safety of tourists.

The main framework for tourism development is the National Strategic Plan of Tourism of Peru to 2025, which has four pillars, including 19 components and 75 lines of action. The pillars are:

- Creation of a competitive and sustainable tourism offer, including tourism intelligence, development of strategies differentiated by market, development of new markets and specialised segments,
- Diversification of the tourist market, including development of competitive destinations and specialised tourism products, sustainable investment, human capital development, and improvement of the quality of tourist services and products,
- Tourism facilitation, including the optimisation of migration management, internal displacement and international relations, development of connectivity, and a uniform and reliable system of tourist information nationwide,
- Sector strengthening via vocational training, including the promotion of a tourism culture, strengthening management relating to tourism security and improving public-private linkages in tourism, as well as consolidating destination management.

The National Strategic Plan is the result of nine work sessions in which technical proposals for the vision, destination development models, strategic pillars, components and lines of action were validated. The Plan is the result of participatory work between the public and private sectors, including representatives of the national associations, and the Ministry of Foreign Trade and Tourism. Its implementation is linked to the formulation of Regional Tourism Plans and contain destination-specific actions.

Additional programmes include *Turismo Empeñe*, which promotes the creation, development and consolidation of tourism enterprises, providing financing for programmes that relate to natural protected areas, cultural heritage or economic development. *Al Turista, Lo Nuestro*, promotes the direct incorporation of local products (agricultural, livestock, fishery, handicrafts, etc.) in the provision of tourism services.

The Ministry of Foreign Trade and Tourism has a new strategy to promote inclusive and sustainable economic growth, which is included in its Institutional Operational Plan 2019. The strategy has a budget of PEN 93 000 for technical assistance to improve artisan workshops located on tourist routes with high visitor flows. It is initially being implemented in three regions: Lambayeque, Ayacucho and Amazonas.

Mainstreaming safety in the Tourism Strategy in Peru

The most recent programme launched by the Ministry of Foreign Trade and Tourism (July 2019) is the Safe Tourism strategy, which promotes business formalisation and seeks to guarantee safe travel and experiences for tourists visiting Peru. Adopting a collaborative approach between all sectors of government, the strategy aims to formalise arrangements and improve security in the tourism sector, improve competitiveness in the provision of tourism services, and strengthen the management by regional and local government. In addition, it will include the promotion of formal tourist services and reduce the number of informal companies in operation. The aims of the programme are to ensure more satisfactory travel experiences for visitors, meet the minimum standards necessary to provide a quality service, and improve prevention, control, action and response to security problems that exist in the tourism sector.

The strategy is the result of a collaboration between several ministries, including the Ministry of Foreign Trade and Tourism; Ministry of Culture; Ministry of Environment; Ministry of Labour and Employment Promotion; Ministry of Transportation and Communications; Ministry of the Interior; Ministry of Defence; Ministry of Production; Ministry of Health; and the Public Ministry. Several private sector associations are also participating, representing restaurants, accommodation, tourist guides, and travel and tourism agencies.

Statistical Profile

Peru: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	104 950	108 100	..	..	..
Overnight visitors (tourists)	38 000	39 800	41 600	43 500	45 500
Same-day visitors (excursionists)	66 950	68 300	..	..	..
Nights in all types of accommodation	228 000	238 800	249 600	261 000	273 000
Hotels and similar establishments	50 751	51 808	54 706	55 812	59 490
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism¹					
Total international arrivals	4 062	4 381	4 718	4 993	5 385
Overnight visitors (tourists)	3 215	3 456	3 744	4 032	4 419
Same-day visitors (excursionists)	847	925	974	960	965
Top markets					
Chile	904	985	1 056	1 101	1 159
United States	514	545	586	599	641
Ecuador	224	256	318	289	293
Colombia	152	165	190	201	219
Argentina	156	171	175	205	216
Nights in all types of accommodation	32 149	31 101	37 445	40 323	44 194
Hotels and similar establishments	13 483	13 513	14 842	14 676	14 302
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	2 733	2 914	3 094	3 227	3 435
Overnight visitors (tourists)	2 442	2 595	2 751	2 875	3 078
Same-day visitors (excursionists)	292	319	343	352	357
Top destinations					
Chile	1 091	1 181	1 288	1 359	1 373
United States	259	289	305	292	294
Bolivia	315	290	270	251	284
Spain	74	80	109	143	160
Ecuador	161	154	136	132	142
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	3 908	4 140	4 303	4 573	3 947
International travel receipts	3 077	3 309	3 501	3 710	3 947 e
International passenger transport receipts	830	831	802	863	..
Outbound tourism					
Total international expenditure	2 119	2 527	2 687	2 916	2 669
International travel expenditure	1 590	1 867	2 029	2 214	2 669 e
International passenger transport expenditure	529	660	658	702	..

.. Not available; e Estimated value

1. Arrivals from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078737>

Peru: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
Total	..	530 241	630 327	..	..	..
Tourism industries	..	486 935	561 671	..	..	..
Accommodation services for visitors
Hotels and similar establishments	23 997	57 636	68 892	..	..	..
Food and beverage serving industry	218 100	190 119	230 588	..	..	..
Passenger transport	..	108 086	138 479	..	..	..
Air passenger transport	..	4 703	6 539	..	..	..
Railways passenger transport	..	474	957	..	..	..
Road passenger transport	..	102 449	130 303	..	..	..
Water passenger transport	..	460	680	..	..	..
Passenger transport supporting services
Transport equipment rental	..	535	591	..	..	..
Travel agencies and other reservation services industry	12 202	30 835	26 564	..	..	..
Cultural industry	..	26 253	20 726	..	..	..
Sports and recreation industry	..	20 773	14 741	..	..	..
Retail trade of country-specific tourism characteristic goods	..	9 141	9 925	..	..	..
Other country-specific tourism industries	..	43 557	51 165	..	..	..
Other industries	..	43 306	68 656	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078756>

Peru: Internal tourism consumption

Million PEN

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	26 925	13 178	43 204
Tourism characteristic products	23 380	12 553	37 093
Accommodation services for visitors	2 390	2 870	6 199
Food and beverage serving services	7 108	2 189	9 297
Passenger transport services	9 648	4 520	14 168
Air passenger transport services	1 792	3 299	5 091
Railways passenger transport services	108	269	377
Road passenger transport services	7 666	930	8 596
Water passenger transport services	82	23	105
Passenger transport supporting services	..	..	..
Transport equipment rental services	165	1	166
Travel agencies and other reservation services industry	630	1 003	1 633
Cultural services	606	978	1 804
Sports and recreation services	1 540	139	1 679
Country-specific tourism characteristic goods	849	812	1 661
Country-specific tourism characteristic services	445	42	487
Other consumption products	3 545	624	6 112
Tourism connected products	682	0	1 403
Non-tourism related consumption products	2 863	624	4 708
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078775>



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