

Chile

Tourism in the economy and outlook for recovery

Tourism has been a growth sector of the Chilean economy. Provisional estimates suggest that tourism accounted for 3.3% of Chile's GDP in 2019, contributing CLP 6.5 trillion to the economy. Tourism-related industries employed 645 773 people, contributing to 7.2% of total employment in 2019. This fell to 504 000 people in 2021, representing 6.1% of total employment.

International tourists fell by 75.2% in 2020 to 1.1 million. The decline was further exacerbated in 2021, with 190 000 international tourists. While inbound tourism represented 34.8% of services exports in 2019, this declined to 10.5% in 2020 and represented 1.7% in 2021.

Domestic overnight tourists decreased by 26.8% to 39.3 million in 2020. In 2021 domestic tourists rebounded to 49.1 million but remained 8.7% below pre-pandemic levels.

Chile expects tourism to return to pre-pandemic levels in mid-2023 or early 2024.

Tourism governance and funding

Tourism in Chile comes under the responsibility of the Undersecretary for Tourism within the Ministry of Economy, Development and Tourism, which oversees the design and implementation of national tourism policies and strategies.

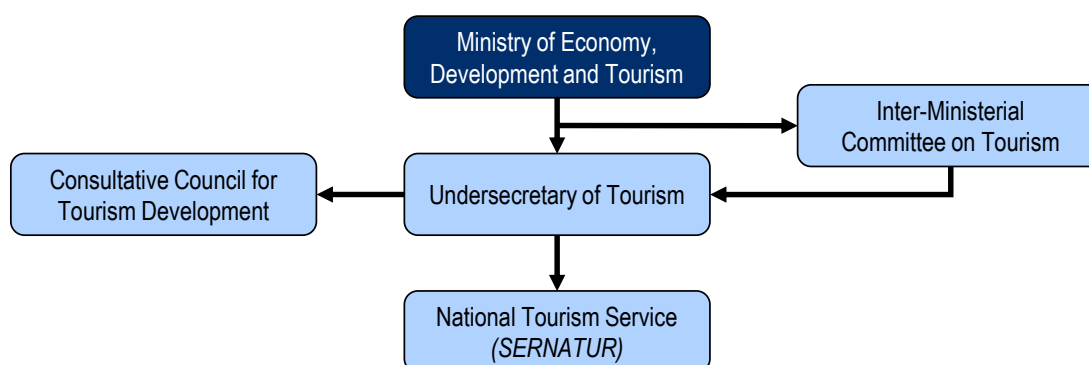
The Undersecretary of Tourism oversees the National Tourism Service, SERNATUR, responsible for executing tourism policies and strategies. SERNATUR has regional offices in each of Chile's 16 administrative regions, headed by a Regional Director. It also has provincial offices in certain territories, including Easter Island, San Pedro de Atacama, Chiloé and Puerto Natales.

Through this regional network, SERNATUR co-ordinates activities with regional governments. The regional governments also work with other central government services, including the Chilean Economic Development Agency (CORFO), which supports entrepreneurship, innovation and competitiveness, and the Technical Co-operation Service (SERCOTEC). Most local administrations have tourism offices that support the sector, and SERNATUR has also established a network of 309 municipalities with local tourism offices.

In terms of governance, there is a new Tourism Law in progress, where the Undersecretary of Tourism and SERNATUR are exploring the possibility of merging into one institution towards a decentralisation policy. The co-ordination between the two institutions has improved as they are now located in the same facility.

In 2021, the Undersecretary of Tourism received a budget of CLP 3.6 billion, while SERNATUR had a budget of CLP 22.5 billion, drawn from the Ministry of Economy. The National Fund for Regional Development also offers funding to support tourism projects.

Chile: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economy, Development and Tourism, 2022.

Tourism policies and programmes

In 2020, the Ministry of Economy, Development and Tourism and SERNATUR started developing the National Tourism Plan, which covers the period to 2030. This includes finance, health and hygiene protocols and joint work with the tourism sector to reactivate tourism SMEs that have been hit hard by the global health crisis. The plan is founded on four main strategic pillars: sustainability, digitalisation, local development and the tourist experience. In addition, reactivation and gender equality are fundamentals of all institutional work.

A reactivation plan focusing on three areas is being developed to deliver assistance to the tourism sector in the short and medium term:

- Reactivate the tourism sector within the health and safety protocols.
- Provide subsidies of CLP 7 billion to the tourism sector, which will be allocated through the Technical Co-operation Service, SERCOTEC.
- Promote domestic travel within Chile and its regions through funding of CLP 3 billion.

Commercialising diverse, high-quality tourism experiences is a key area of focus in the recovery plan, with action being taken in a number of priority areas, including:

- **Rural and indigenous tourism:** in order to stimulate local economic growth, work has been focused on the improvement of the quality, attractiveness, and diversity of the tourism offer while ensuring coherence with cultural heritage. The adaptation of health regulations to the rural reality and the implementation of sustainable sanitary solutions for rural entrepreneurs are also undertaken as part of the social improvement led by tourism. The Undersecretary of Tourism co-ordinates initiatives together with the National Association of Indigenous Tourism (ANTI), National Corporation for the Indigenous Development (CONADI) and the National Agricultural Development Institute (INDAP).
- **Wine and gastronomy tourism:** work has been focused on improving the quality, attractiveness and diversity of the wine and gastronomy tourism offer and the role suppliers play in the gastronomy tourism value chain. The Multi-regional Strategic Programme of Sustainable Wine Tourism is a public-private initiative which brings together big and small wine producers from several regions with the tourism industry. Gastronomy tourism is being co-ordinated in a public-private commission led by the Undersecretary of Tourism and the Transform Tourism (Transforma Turismo) programme.

- **Cultural and heritage tourism:** a national Culture Tourism Plan is now underway, co-ordinated by the Ministry of Cultures, Arts and Heritage and the Undersecretary of Tourism.
- **Adventure tourism:** initiatives in the adventure tourism sector include strengthening host communities' capacities around national parks, modification of adventure tourism regulations, approval of international certifications and the interaction of the adventure tourism segment. Transform Tourism (Transforma Turismo) programme leads the Mountain Adventure and Nature Tourism National Promotion Plan, which co-ordinates a public-private commission for the development of adventure tourism.

Domestic travel demand has been driven by the Social Tourism Programme, which subsidises tourism packages for seniors, students and families to travel around Chile, worth CLP 8.7 billion in 2021. This programme benefits a yearly average of 67 tourism destinations and 750 tourism services providers, mostly micro, small and medium-sized companies.

A Tourism Infrastructure Masterplan co-ordinated with the Ministry of Public Works has recently been implemented for the 2021-25 period. This CLP 1.4 billion plan is focused on infrastructure for national parks, scenic routes development, coastline recovery and renovation, provision of tourism attractions and road connectivity.

An Executive Committee for the Attraction of Tourism Investments was established in 2020, formed by 11 public institutions, with the strategic role of strengthening a pro-investment ecosystem in tourism. The Committee developed a 2020-25 Action Plan to facilitate the delivery of the investments system, the definition of investment portfolios and its diffusion. The Invest Tourism initiative (Invierte Turismo), developed together with Invest Chile, the Chilean agency for foreign investment attraction, maps tourism investment opportunities at the regional level and highlights investment opportunities throughout the country.

The Strategic Plan for Human Capital is being updated for the period 2023-26. Its implementation relies on a public-private commission that brings together different actors from the tourism, hotel and gastronomy industry who work together for the development and strengthening of the human capital of the sector.

Tourism Reactivation Plans 2021-22 in Chile

In 2021 Chile implemented a reactivation plan for tourism which utilised a Community Reactivation Index. This index identified and ranked the effects of the COVID-19 crisis in Chilean communities. The index considered a number of variables, including the days each territory spent in strict quarantine and the relevance of tourism in local economies.

From this, 33 destinations were prioritised throughout the country, and regional interviews took place to identify triggering initiatives for each prioritised territory. In the long term, connectivity and formalisation were among the most important identified initiatives, while the diversification of high-quality touristic products was identified in the short term. Once internal travelling limitations were lifted, the Reactivation Plan shifted to a new set of breaches.

In July 2022, a new Reactivation Plan was launched, which targets the reactivation of MSMEs. Aligned with the "Chile Apoya" (Chile Supports) inclusive recovery programme, the Plan is designed to finance training, business planning, consultancy, technical assistance, working capital and/or investment projects. The Chile Supports 2022 Programme will run in all 16 regions of the country and will finance 100% of the costs of tourism-related projects, up to a limit of CLP 4 million.

Statistical Profile

Chile: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism¹					
Total domestic trips	63 773	73 344	74 459	54 425	68 377
Overnight visitors (tourists)	46 016 e	52 974 e	53 749	39 323	49 062
Same-day visitors (excursionists)	17 756 e	20 370 e	20 711 e	15 102 e	19 315 e
Nights in all types of accommodation	15 325 |	15 742	15 150	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	7 621	6 603	5 431	1 310	192
Overnight visitors (tourists)	6 450	5 723	4 518	1 119	190
Same-day visitors (excursionists)	1 171	880	913	191	2
Top markets					
Peru	394	389	411	98	27
Argentina	3 324	2 422	1 435	414	21
United States	212	222	225	62	18
Brazil	545	589	542	78	14
Bolivia	480	541	468	133	4
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	4 367	4 605	4 091 |	1 162	519
Overnight visitors (tourists)	3 620	3 825	3 346 |	963	514
Same-day visitors (excursionists)	747	780	745	198	6
Top destinations					
Peru	1 100	1 055	1 018 |	..	..
Argentina	1 014	1 123	996 |	..	..
United States	292	306	295 |	..	..
Brazil	248	301	284 |	..	..
Europe	..	..	193 |	..	..
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	4 115	3 911	3 278	1 033	633
International travel receipts	3 152	2 897	2 303	413	113
International passenger transport receipts	984	1 040	1 000	628	520
Outbound tourism					
Total international expenditure	3 094	3 124	3 142	720	580
International travel expenditure	2 329	2 394	2 459	540	301
International passenger transport expenditure	789	761	714	190	279

.. Not available; e Estimated value; | Break in series

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

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/6hamq0>

Chile: Enterprises and employment in tourism


	Number of establishments ¹	Number of persons employed ²				
	2020	2017	2018	2019	2020	2021
Total	170 268	..	636 477	645 773	456 513	504 000
Tourism industries	126 738	..	395 517	400 185	266 811	306 471
Accommodation services for visitors	12 666	..	..	..	..	..
Hotels and similar establishments	5 040	..	..	..	..	..
Food and beverage serving industry	54 123	..	..	..	..	..
Passenger transport	34 000	..	107 244	104 056	87 176	92 388
Air passenger transport	166	..	..	..	..	..
Railways passenger transport	8	..	..	..	..	..
Road passenger transport	33 443	..	..	..	..	..
Water passenger transport	383	..	..	..	..	..
Passenger transport supporting services	..	..	133 716	141 533	102 526	105 141
Transport equipment rental	5 473	..	..	..	..	..
Travel agencies and other reservation services industry	2 685	..	..	..	..	..
Cultural industry	4 223	..	..	..	..	..
Sports and recreation industry	7 888	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	5 680	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	43 530	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/9xi5um>

Chile: Internal tourism consumption

Million USD

	2021		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	5 846 e	99	..
Consumption products
Tourism characteristic products
Accommodation services for visitors
Food and beverage serving services
Passenger transport services
Air passenger transport services
Railways passenger transport services
Road passenger transport services
Water passenger transport services
Passenger transport supporting services
Transport equipment rental services
Travel agencies and other reservation services industry
Cultural services
Sports and recreation services
Country-specific tourism characteristic goods
Country-specific tourism characteristic services
Other consumption products
Tourism connected products
Non-tourism related consumption products
Non-consumption products

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/mx9t7u>



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