

Peru

Tourism in the economy and outlook for recovery

In 2019, the tourism sector contributed 3.9% to GDP and directly generated 725 980 jobs which represented 4.1% of Peru's employed economically active population. The tourism sector's contribution decreased to 1.5% of Peru's GDP, and tourism jobs more than halved to 353 552. Foreign exchange revenues totalled just over PEN 3.5 billion, 79% less than in 2019.

With a total of 897 000 international tourists in 2020, inbound tourism decreased by almost 80% compared to 2019, when there were 4.4 million international tourists. This declined further in 2021, when Peru recorded 444 000 international arrivals, down 50% compared to 2020 and 90% below 2019 levels. Arrivals from the United States rebounded to 177 000, representing 39.8% of total tourists in 2021. Tourists from Chile, historically the top source market, remained low (37 000 tourists compared to 1.2 million in 2019).

Domestic tourism is the driver of tourism in Peru, with 48.6 million domestic tourists in 2019. Domestic tourism was hard hit by the pandemic and remained low in 2021, with 15.6 million tourists, up 8.3% compared to 2020, although still down 70% from pre-pandemic levels.

Given the pace of recovery of tourist trips observed to date, it is unlikely that inbound tourism will reach pre-pandemic levels before 2025 or 2026.

Tourism governance and funding

The Ministry of Foreign Trade and Tourism (MINCETUR) is the tourism sector's lead political and administrative authority. Its role is to define, direct, execute and co-ordinate the country's foreign trade and tourism policy in harmony with the general policy of Peru.

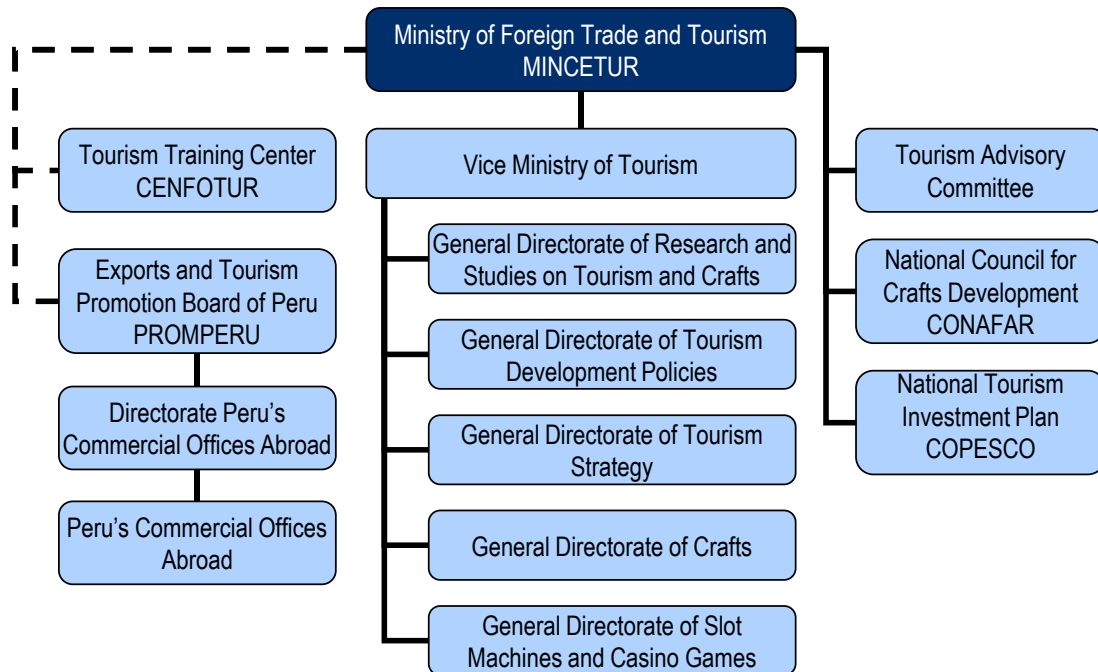
The Vice Ministry for Tourism, part of MINCETUR, oversees the General Directorate of Tourism Development Policy, which is responsible for implementing, evaluating and supervising compliance with tourism policy. The Directorate also formulates and implements actions to improve the quality of tourism services, its environmental management, tourism facilitation, tourist protection, and the promotion of culture. The Vice Ministry for Tourism oversees the General Directorates of Research and Studies on Tourism and Handicrafts, Tourism Strategy, Crafts, and Casino Games and Slot Machines.

MINCETUR has two Specialised Advisory Bodies - the Tourism Advisory Committee and the National Council for Handicraft Development. Two other bodies attached to the Ministry are the Tourism Training Centre (CENFOTUR) and the Exports and Tourism Promotion Board of Peru (PROMPERÚ). Peru's Commercial Offices Abroad are operated by PROMPERÚ.

Regional governments are responsible for formulating, approving and executing policies relating to the development of regional tourist activity, qualification of regional tourist service providers, and co-ordination with local governments on tourism activities. They also maintain and update directories of tourism service providers, tourism resources, and regional events calendars.

The 2021 Ministry of Foreign Trade and Tourism budget was PEN 253 million. The budget for the Tourism Promotion Board was PEN 239.6 million, and the budget for the Tourism Training Centre was PEN 15 million. In 2020, the Ministry of Foreign Trade and Tourism budget was PEN 750 million due to additional financial transfers for the Repatriation Programme implemented by Peru during the COVID-19 pandemic, which provided hotel accommodation to Peruvian citizens repatriated from abroad. The Tourism Promotion Board's budget was PEN 76 million, and the Tourism Training Centre's budget was PEN 7 million.

Peru: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Foreign Trade and Tourism, 2022.

Tourism policies and programmes

In response to the pandemic, a Technical Committee for the Reactivation of the Tourism Sector in the Cusco Region (public and private mechanism) has been promoted to provide social solutions in five working subgroups: public investment; planning and management; support to entrepreneurs; facilitation and regulations; and tourism promotion. The Committee's main achievement has been the increase in the capacity for the entry of tourists to the Machu Picchu Archaeological Site.

Peru has developed two management instruments in response to the pandemic: the Tourism Sector Emergency Plan to 2023 and the National Strategy for the Tourism Sector Reactivation 2022-25 (see box below).

Under the Plan, a number of initiatives have taken place, including:

- The Guide of Regional Tourism Marketing Plans, developed by PROMPERÚ in agreement with the Swiss Import Promotion Programme. This is a step-by-step guide for the development of a regional marketing plan. A related training programme was signed with several regional governments.

- The Programme to Stimulate Business Competitiveness, launched in 2020. It was composed of 19 courses designed to strengthen the competitiveness of tourism MSMEs. More than 200 companies participated in the online sessions nationwide.
- The Virtual Classroom, launched in 2021, as an online educational platform that allows entrepreneurs, students and other interested parties access to training and certification on topics related to commercial matters, digital tools, innovation and commercial intelligence. The Virtual Classroom has more than 5 000 users nationwide.
- The Peru Carbon Footprint Scheme, which has registered 27 hotels, demonstrating their commitment to reducing their greenhouse gas emissions and environmental impact.
- The Business Support Fund for SMEs in the tourism sector (FAE-Turismo) was established as a special guarantee fund of PEN 200 million. It was created to promote access to financing for micro and small tourism businesses affected by the adverse international and local context. This fund benefitted 1 969 enterprises across 23 regions in 2020-21.

MINCETUR and CENFOTUR have also been working on the Good Practices Application System, the principal scheme designed for tourism service providers, incorporating content relating to service management, environmental management and health security.

National Strategy for the Reactivation of the Tourism Sector 2022-25 in Peru

The purpose of Peru's National Strategy for the Reactivation of the Tourism Sector 2022-25 is to promote the reactivation of the tourism sector, generating unique and biosecure tourism experiences based on the country's natural wealth and ancestral culture, with inclusion and sustainability. The objective for 2022 is to surpass 1.4 million international tourists and 24 million domestic tourists and exceed 995 000 tourism jobs.

Four strategic objectives have been defined:

- Strengthen tourism planning, organisation, governance and management in destinations: manage resources for the development of the tourism sector and redistribute them in a decentralised manner; improve information systems for tourism and handicrafts; promote the academic complementation of the training offerings in tourism; and generate strategic alliances.
- Improve territorial conditions and tourism facilitation: promote intersectoral co-operation with the regions; improve biosafety conditions in tourism service providers; promote fiscal and labour incentives for tourism service providers; and strengthen tourism safety in the destinations in co-ordination with strategic allies.
- Strengthen and promote the supply of tourism products and experiences: promote the capacity of public spending in tourism to close gaps; encourage private investment in tourism; generate direct support measures for entrepreneurs; promote social tourism actions; and promote handicraft development.
- Improve the promotion and positioning of the tourism offer based on quality, sustainability and biosafety attributes: improve the country's positioning as a destination and strengthen the promotion of domestic and inbound tourism.

Statistical Profile

Peru: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	121 067	128 839	134 995	47 070	64 509
Overnight visitors (tourists)	44 382	46 517	48 575	14 370 p	15 562 e
Same-day visitors (excursionists)	76 684	82 322	86 420	32 700 p	48 947 e
Nights in all types of accommodation	261 000	273 000	291 600	43 109 p	62 250 e
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism¹					
Total international arrivals	4 993	5 385	5 275	1 119	444
Overnight visitors (tourists)	4 032	4 419	4 372	897	444
Same-day visitors (excursionists)	960	965	903	222	0
Top markets					
United States	599	641	657	128	177
Colombia	201	219	224	49	41
Chile	1 101	1 159	1 196	288	37
Argentina	205	216	215	45	14
Brazil	174	178	194	34	11
Nights in all types of accommodation	40 323	44 194	43 718	..	..
Hotels and similar establishments	14 676	14 302	14 796	3 415	3 573
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	3 227	3 435	3 634	893	617
Overnight visitors (tourists)	2 875	3 078	3 275	791	617
Same-day visitors (excursionists)	352	357	359	102	0
Top destinations					
United States	292	294	325	89	269
Spain	143	160	184	42	70
Colombia	117	135	177	44	38
Chile	1 359	1 373	1 417	334	36
Argentina	100	109	99	24	7
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	4 573	4 505	4 784	794	1 042
International travel receipts	3 710	3 557	3 819	794 e	688
International passenger transport receipts	863	947	965	..	355
Outbound tourism					
Total international expenditure	2 916	3 352	3 671	744	1 521
International travel expenditure	2 214	2 604	2 818	744 e	1 149
International passenger transport expenditure	702	749	853	..	372

.. Not available; e Estimated value; p Provisional data

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

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/mk7ycn>

Peru: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
Total	..	674 754	700 367	725 980 e	353 552 e	..
Tourism industries
Accommodation services for visitors
Hotels and similar establishments	25 323	74 360	80 044	81 964 e	40 741 e	..
Food and beverage serving industry	279 299	242 668	236 632	252 152 e	125 284 e	..
Passenger transport
Air passenger transport	..	4 952	4 799	4 982 e	2 443 e	..
Railways passenger transport
Road passenger transport	..	136 845	139 745	143 582 e	71 127 e	..
Water passenger transport	..	702	711	721 e	362 e	..
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry	15 898	27 748	28 047	28 781 e	14 420 e	..
Cultural industry	..	22 244	20 373	20 708 e	10 369 e	..
Sports and recreation industry	..	15 207	15 466	15 843 e	7 872 e	..
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries	..	50 811	53 744	55 033	27 355	..
Other industries	..	99 217	120 806	122 214 e	53 579 e	..

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

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

Peru: Internal tourism consumption

Million PEN

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total
Consumption products	11 700	3 500	17 300
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

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/dyxlq0>



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